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LUCILE PACKARD CHILDREN'S HOSPITAL

**UNITED STATES DISTRICT COURT
NORTHERN DISTRICT OF CALIFORNIA**

STANFORD HOSPITAL & CLINICS and
LUCILE PACKARD CHILDREN'S
HOSPITAL,

Petitioners,

vs.

SERVICE EMPLOYEES
INTERNATIONAL UNION, LOCAL 715,

Respondent.

Case No: 5:07-CV-05158-JF

DECLARATION OF SCOTT P. INCIARDI
IN SUPPORT OF STANFORD HOSPITAL
AND CLINICS' AND LUCILE PACKARD
CHILDREN'S HOSPITALS' MOTIONS
FOR SUMMARY JUDGMENT OF, IN
THE ALTERNATIVE, SUMMARY
ADJUDICATION OF CLAIMS OR
DEFENSES

Date: August 29, 2008
Time: 9:00 A.M.
Dept: Ctrm. 3, 5th Floor

Judge: Hon. Jeremy Fogel

SERVICE EMPLOYEES
INTERNATIONAL UNION, LOCAL 715

Petitioner and Counter-
Respondent,

vs.

STANFORD HOSPITAL & CLINICS and
LUCILE PACKARD CHILDREN'S
HOSPITAL

Respondents and Counter-
Petitioners.

Case No: 5:08-CV-00213-JF

Judge: Hon. Jeremy Fogel

SERVICE EMPLOYEES
INTERNATIONAL UNION, LOCAL 715

Petitioner,

vs.

STANFORD HOSPITAL & CLINICS and
LUCILE PACKARD CHILDREN'S
HOSPITAL

Respondents.

Case No: 5:08-CV-00215-JF

Judge: Hon. Jeremy Fogel

SERVICE EMPLOYEES
INTERNATIONAL UNION, LOCAL 715

Petitioner,

vs.

STANFORD HOSPITAL & CLINICS and
LUCILE PACKARD CHILDREN'S
HOSPITAL

Respondents.

Case No: 5:08-CV-00216-JF

Judge: Hon. Jeremy Fogel

SERVICE EMPLOYEES
INTERNATIONAL UNION, LOCAL 715

Petitioner,

vs.

STANFORD HOSPITAL & CLINICS and
LUCILE PACKARD CHILDREN'S
HOSPITAL

Respondents.

Case No: 5:08-CV-01726-JF

Judge: Hon. Jeremy Fogel

SERVICE EMPLOYEES
INTERNATIONAL UNION, LOCAL 715

Petitioner,

vs.

STANFORD HOSPITAL & CLINICS and
LUCILE PACKARD CHILDREN'S
HOSPITAL

Respondents.

Case No: 5:08-CV-01727-JF

Judge: Hon. Jeremy Fogel

1 I, Scott P. Inciardi, declare as follows:

2 1. I am an attorney admitted to practice in the State of California and before this
3 Court, and am an associate with the law firm of Foley & Lardner LLP, attorneys of record for
4 Stanford Hospital And Clinics And Lucile Packard Children's Hospital (the "Hospitals") in these
5 matters. I make this declaration based on my personal knowledge. If called as a witness, I could
6 and would testify competently under oath to the following facts.

7 **Local 715 Website**

8 2. On March 28, 2008, I used an internet browser to access the web site
9 <http://www.seiu715.org/>.

10 3. Once I accessed the web page at the foregoing address (the "homepage"), I
11 pressed "Prt Scr" on my computer keyboard to record a "screen-shot" of the image that was on
12 my computer screen at that time. I then accessed a Microsoft Word document designated
13 document number SFCA_1330962.1 (the "Word Document"). I activated the "paste" function in
14 the Word Document to insert the screenshot into the Word Document. (Hereinafter, the
15 previously-described process of recording a screen-shot image and reproducing it in the Word
16 Document will be referred to as "taking a screen-shot.") A true and correct copy of the screen-
17 shot is attached hereto as Exhibit A, page 1 (Exhibit "A-1").

18 4. I next used the above-described screen-shot procedure to record an image of the
19 bottom portion of the homepage, a true and correct copy of which is attached hereto as Exhibit
20 A-2.

21 5. Next, I moved my cursor to the menu-bar on the left side of the homepage and
22 clicked the button marked "On The Job." I took screen shots of the web page that appeared, true
23 and correct copies of which are attached as Exhibit A-3-4.

24 6. Next, I moved my cursor to the menu-bar on the left side of the homepage and
25 clicked the button marked "benefits." I took screen shots of the web page that appeared, true
26 and correct copies of which are attached as Exhibit A-5-7.

27 7. Next, I moved my cursor to the menu-bar on the left side of the homepage and
28 clicked the button marked "our local." I took screen shots of the web page that appeared, true

1 and correct copies of which are attached as Exhibit A-8-9.

2 8. Next, I moved my cursor to the menu-bar on the left side of the homepage and
3 clicked the button marked "Action Center." I took screen shots of the web page that appeared,
4 true and correct copies of which are attached as Exhibit A-10-11.

5 9. Next, I moved my cursor to the menu-bar on the left side of the homepage and
6 clicked the button marked "Around SEIU." I took screen shots of the web page that appeared,
7 true and correct copies of which are attached as Exhibit A-12-13.

8 10. Next, I moved my cursor to the menu-bar on the left side of the homepage and
9 clicked the button marked "Jin SEIU." I took screen shots of the web page that appeared, true
10 and correct copies of which are attached as Exhibit A-14-15

11 11. Next, I moved my cursor to the menu-bar on the left side of the homepage and
12 clicked the button marked "Events Calendar." I took screen shots of the web page that appeared,
13 true and correct copies of which are attached as Exhibit A-16-17.

14 12. Next, I moved my cursor to the menu-bar on the left side of the homepage and
15 clicked the button marked "SEIU JOBS." I took screen shots of the web page that appeared,
16 true and correct copies of which are attached as Exhibit A-18-19.

17 13. Next, I moved my cursor to the menu-bar on the left side of the homepage and
18 clicked the button marked "PRESS CENTER." I used the drop-down menu to select "2008." I
19 took a screen-shot of the resulting web page, a true and correct copy of which is attached hereto
20 as Exhibit A-20. I then used the drop-down menu to select "2007." I took a screen-shot of the
21 resulting web page, a true and correct copy of which is attached hereto as Exhibit A-21.

22 14. Next, I moved my cursor to the menu-bar on the left side of the homepage and
23 clicked the button marked "CONTACT US." I took screen shots of the web page that appeared,
24 true and correct copies of which are attached as Exhibit A-22-23.

25 15. On April 9, 2008, I again accessed the web site, <http://www.seiu715.org/>. The
26 appearance of the homepage had changed since the last time I accessed it on March 28, 2008.
27 Using a Microsoft Word document designated SFCA-1367631.1, I took screen shots of the home
28 page, true and correct copies of which are attached as Exhibit B 1-2.

1 16. Next, I moved my cursor to the menu-bar near the top of the homepage and
2 clicked the button marked "On The Job." I took a screen shot of the web page that appeared, a
3 true and correct copy of which is attached as Exhibit B 3.

4 17. Next, I moved my cursor to the menu-bar near the top of the homepage and
5 clicked the link marked "Benefits." I took screen shots of the web page that appeared, true and
6 correct copies of which are attached hereto as Exhibit B 4-6

7 18. Next, I moved my cursor to the menu-bar near the top of the homepage and
8 clicked the link marked "Our Local." I took screen shots of the web page that appeared, true and
9 correct copies of which are attached hereto as Exhibit B 7-8.

10 19. Next, I moved my cursor to the menu-bar near the top of the homepage and
11 clicked the button marked "Action Center." I took a screen shot of the web page that appeared, a
12 true and correct copy of which is attached as Exhibit B 9.

13 20. Next, I moved my cursor to the menu-bar near the top of the homepage and
14 clicked the button marked "Around SEIU." I took a screen shot of the web page that appeared, a
15 true and correct copy of which is attached as Exhibit B 10.

16 21. Next, I moved my cursor near the top of the homepage and clicked on the link
17 marked "Visit our State Council." Clicking this link caused a new web page to open. The
18 address of the new web page was <http://www.seiucanet.org>. I took a screen shot of this web page, a
19 true and correct copy of which is attached hereto as Exhibit B 11. Then I closed the new web
20 page.

21 22. Next, I moved my cursor near the top of the homepage and clicked on the link
22 marked "SEIU Store." Clicking this link caused a new web page to open. The address of the
23 new web page was <http://seiu.imagepointe.com>. I took a screen shot of this web page, a true and
24 correct copy of which is attached hereto as Exhibit B 12. Then I closed the new web page.

25 23. Next, I moved my cursor to the menu-bar near the top of the homepage and
26 clicked the link marked "Contact Us." I took a screen shot of the web page that appeared, a true
27 and correct copy of which is attached as Exhibit B 13.

28

UHW Website

24. On March 28, 2008, I used an internet browser to access the web site <http://www.seiu-uhw.org/>.

25. Once I accessed the web page at the foregoing address (the "homepage"), I took a screen-shot and inserted it into a Microsoft Word document designated document number SFCA_1336378.1. A true and correct copy of the screen-shot is attached hereto as Exhibit C, page 1 (Exhibit "C-1").

26. Next, I moved my cursor to the left-hand side of the homepage and clicked the link marked "hospitals/clinics." I took a screen shot of the web page that appeared, a true and correct copy of which is attached as Exhibit C-2.

27. Next, I moved my cursor to the top portion of the "hospitals/clinics" page and clicked the link marked "List of 2008 Contracts to be Renewed." This caused a document titled "2008 CONTRACT EXPIRATIONS" to be displayed. I took screen shots of the document, true and correct copies of which are attached as Exhibit C-3-7. I also used the "print" function on my computer to generate a printed version of the document, a true and correct copy of which is attached hereto as Exhibit D.

28. Next, I moved my cursor to the top portion of the "hospitals/clinics" page and clicked the link marked "SEIU Targets 2008 Contracts." This caused a document containing a news article titled "SEIU Targets 2008 contracts with hospitals, nursing homes" to be displayed. I took a screen shot of the document, a true and correct copy of which is attached as Exhibit C-8. I also used the "print" function on my computer to generate a printed version of the document, a true and correct copy of which is attached hereto as Exhibit E.

29. Next, I returned to the homepage, moved my cursor to the green menu bar near the top of the page, and clicked the link marked "facilities." I took screen shots of the web page that appeared, true and correct copies of which are attached hereto as Exhibit C 9-21.

30. Next, I consulted the list of facilities on the "facilities" page and located link marked "Stanford University Medical Center" (which appears at Exhibit C-20). I clicked on the link and took a screen shot of the web page that appeared, a true and correct copy of which is

1 attached hereto as Exhibit C-22.

2 **Local 521 Website**

3 31. On March 28, 2008, I used an internet browser to access the web site
4 <http://www.seiu521.org/>.

5 32. Once I accessed the web page at the foregoing address (the "homepage"), I took a
6 screen shot of the image that appeared and inserted into a Microsoft Word document designated
7 document number SFCA_1329121.1. A true and correct copy of the screen-shot is attached
8 hereto as Exhibit F, page 1 (Exhibit "F-1").

9 33. Next, I moved my cursor to the right-hand side of the homepage and clicked the
10 link marked "Executive Board Budget & Actions." I took screen shots of the web page that
11 appeared, true and correct copies of which are attached as Exhibit F-2-7.

12 34. Next, I moved my cursor to the area of the "Executive Board Budget & Actions"
13 page marked "Income Reports: Bank Balance:" and clicked the link marked "August, 2007."
14 This caused a document titled "SEIU Local 521 Bank Balance on Saving and Investment
15 accounts as of August 31, 2007" to be displayed. I took screen shots of this document, true and
16 correct copies of which are attached as Exhibit F-8-9. I also used the "print" function on my
17 computer to generate a printed version of the document, a true and correct copy of which is
18 attached hereto as Exhibit G.

19 35. Next, I moved my cursor to the area of the "Executive Board Budget & Actions"
20 page marked "Income Reports: Bank Balance:" and clicked the link marked "September, 2007."
21 This caused a document titled "SEIU Local 521 Bank Balance on Saving and Investment
22 accounts as of September 30, 2007" to be displayed. I took screen shots of this document, true
23 and correct copies of which are attached as Exhibit F-10-11. I also used the "print" function on
24 my computer to generate a printed version of the document, a true and correct copy of which is
25 attached hereto as Exhibit H.

26 36. Next, I moved my cursor to the area of the "Executive Board Budget & Actions"
27 page marked "Income Reports: Bank Balance:" and clicked the link marked "November, 2007."
28 This caused a document titled "SEIU Local 521 Bank Balance on Saving and Investment

1 accounts as of November 30, 2007” to be displayed. I took screen shots of this document, true
2 and correct copies of which are attached as Exhibit F-12-13. I also used the “print” function on
3 my computer to generate a printed version of the document, a true and correct copy of which is
4 attached hereto as Exhibit I.

5 37. Next, I moved my cursor to the area of the “Executive Board Budget & Actions”
6 page marked “Income Reports: Bank Balance:” and clicked the link marked “December, 2007.”
7 This caused a document titled “SEIU Local 521 Bank Balance on Saving and Investment
8 accounts as of December 31, 2007” to be displayed. I took screen shots of this document, true
9 and correct copies of which are attached as Exhibit F-14-15. I also used the “print” function on
10 my computer to generate a printed version of the document, a true and correct copy of which is
11 attached hereto as Exhibit J.

12 38. Next, I moved my cursor to the area of the “Executive Board Budget & Actions”
13 page marked “Income Reports: Bank Balance:” and clicked the link marked “January, 2008.”
14 This caused a document titled “SEIU Local 521 Bank Balance on Saving and Investment
15 accounts as of January 31, 2008” to be displayed. I took screen shots of this document, true and
16 correct copies of which are attached as Exhibit F-16-17. I also used the “print” function on my
17 computer to generate a printed version of the document, a true and correct copy of which is
18 attached hereto as Exhibit K.

19 39. Next, I moved my cursor to the area of the “Executive Board Budget & Actions”
20 page marked “Income Reports: Dues Receipts:” and clicked the link marked “Year 2007.” This
21 caused a document titled “SEIU Local 521 Dues Receipts of the year of 2007” to be displayed. I
22 took screen shots of this document, true and correct copies of which are attached as Exhibit F-
23 18-24. I also used the “print” function on my computer to generate a printed version of the
24 document, a true and correct copy of which is attached hereto as Exhibit L.

25 40. Next, I moved my cursor to the area of the “Executive Board Budget & Actions”
26 page marked “Income Reports: General Income:” and clicked the link marked “May 2007.” This
27 caused a document titled “SEIU Local 521 Financial Statement For the month of May 2007” to
28 be displayed. I took screen shots of this document, true and correct copies of which are attached

1 as Exhibit F-25-34. I also used the "print" function on my computer to generate a printed
2 version of the document, a true and correct copy of which is attached hereto as Exhibit M.

3 41. Next, I moved my cursor to the area of the "Executive Board Budget & Actions"
4 page marked "Income Reports: General Income:" and clicked the link marked "June 2007." This
5 caused a document titled "SEIU Local 521 Financial Statement For the month of June 2007" to
6 be displayed. I took screen shots of this document, true and correct copies of which are attached
7 as Exhibit F-35-44. I also used the "print" function on my computer to generate a printed
8 version of the document, a true and correct copy of which is attached hereto as Exhibit N.

9 42. Next, I moved my cursor to the area of the "Executive Board Budget & Actions"
10 page marked "Income Reports: General Income:" and clicked the link marked "August 2007."
11 This caused a document titled "SEIU Local 521 Financial Statement For the month of August
12 2007" to be displayed. I took screen shots of this document, true and correct copies of which are
13 attached as Exhibit F-45-54. I also used the "print" function on my computer to generate a
14 printed version of the document, a true and correct copy of which is attached hereto as Exhibit O.

15 43. Next, I moved my cursor to the area of the "Executive Board Budget & Actions"
16 page marked "Income Reports: General Income:" and clicked the link marked "September
17 2007." This caused a document with a partially visible title reading "SEIU Local 521 Financial
18 Statement For the month of September 2007" to be displayed. I took screen shots of this
19 document, true and correct copies of which are attached as Exhibit F-55-67. I also used the
20 "print" function on my computer to generate a printed version of the document, a true and
21 correct copy of which is attached hereto as Exhibit P.

22 44. Next, I moved my cursor to the area of the "Executive Board Budget & Actions"
23 page marked "Income Reports: General Income:" and clicked the link marked "November
24 2007." This caused a document titled "SEIU Local 521 Financial Statement - For the month of
25 November 2007" to be displayed. I took screen shots of this document, true and correct copies
26 of which are attached as Exhibit F-68-72. I also used the "print" function on my computer to
27 generate a printed version of the document, a true and correct copy of which is attached hereto as
28 Exhibit Q.

45. Next, I moved my cursor to the area of the "Executive Board Budget & Actions" page marked "Income Reports: General Income:" and clicked the link marked "January 2008." This caused a document titled "SEIU Local 521 Financial Statement for the year of 2008" to be displayed. I took screen shots of this document, true and correct copies of which are attached as Exhibit F-73-76. I also used the "print" function on my computer to generate a printed version of the document, a true and correct copy of which is attached hereto as Exhibit R.

46. Next, I returned to the homepage and clicked on the link on the left hand side of the page marked "About Us/Contact Us." I took screenshots of the web page that appeared, true and correct copies of which are attached hereto as Exhibit F-77-81.

Documents Produced By The SEIU International

47. On July 1, 2008, Norman Gleichman, counsel for Service Employees International Union ("SEIU" or the "International") produced certain documents pursuant to a subpoena served upon SEIU by the Hospitals. A true and correct copy of Mr. Gleichman's e-mail enclosing the documents is attached hereto as Exhibit S.

48. The documents produced by SEIU included the following:

49. A document titled "Hearing Officers' Joint Report And Recommendations," a true and correct copy of which is attached hereto as Exhibit T;

50. An "Order Of Reorganization" Signed by Andrew L. Stern, a true and correct copy of which is attached hereto as Exhibit U;

51. A June 8, 2007 letter from Andrew L. Stern to Bruce Smith regarding Mr. Smith's appointment as Trustee of SEIU Local 715, a true and correct copy of which is attached hereto as Exhibit V;

52. A document titled "Report And Recommendation To The International Executive Board," a true and correct copy of which is attached hereto as Exhibit W;

53. An August 23, 2007 letter from Anna Burger to Bruce Smith, a true and correct copy of which is attached hereto as Exhibit X;

54. A "Form LM-15 Trusteeship Report" a true and correct copy of which is attached hereto as Exhibit Y.

Documents Produced By Local 715

55. On June 23, 2008, Local 715 produced documents pursuant to discovery requests issued by the Hospitals. Local 715 produced the same set of documents in each of the six (6) above-captioned cases. Among the documents produced by Local 715 were the following:

56. A document titled "Order Of Emergency Trusteeship Appointing A Trustee To Take Charge And Control Of The Affairs Of Service Employees International Union, Local 715" which was labeled SEIU0001-SEIU0002. A true and correct copy of this document is attached hereto as Exhibit Z.

57. A June 14, 2007 fax from Bruce Smith to Laurie Quintel, which was labeled SEIU0003-SEIU0005. A true and correct copy of this document is attached hereto as Exhibit AA.

58. A June 18, 2007 letter from Bruce Smith to Laurie Quintel labeled SEIU0006-SEIU0007. A true and correct copy of this document is attached hereto as Exhibit BB.

59. A set of images from the Local 715 website labeled SEIU0010-SEIU0019. A true and correct copy of these documents is attached hereto as Exhibit CC.

60. An August 15, 2006 fax from "Greg P." to Laurie Quintel enclosing a copy of a "Servicing Agreement," labeled SEIU0020-SEIU0023. A true and correct copy of this document is attached hereto as Exhibit DD.

61. An August 11, 2006 letter from William A. Sokol to Laurence R. Arnold enclosing a copy of a "Servicing Agreement," labeled SEIU0024-SEIU0027. A true and correct copy of this document is attached hereto as Exhibit EE.

62. An August 17, 2006 letter from William A. Sokol to Laurence R. Arnold, labeled SEIU0028. A true and correct copy of this document is attached hereto as Exhibit FF.

63. A document titled "Form LM-15 Trusteeship Report," labeled SEIU0029-SEIU0034. A true and correct copy of this document is attached hereto as Exhibit GG.

64. Attached hereto as Exhibit HH is a printout of the Court's docket in Case Number 5:08-CV00213 JF from July 15, 2008. The docket reflects that Local 715 has not filed an answer to the Hospitals' Counter-Petition To Vacate Arbitration Award, which was filed on March 6,

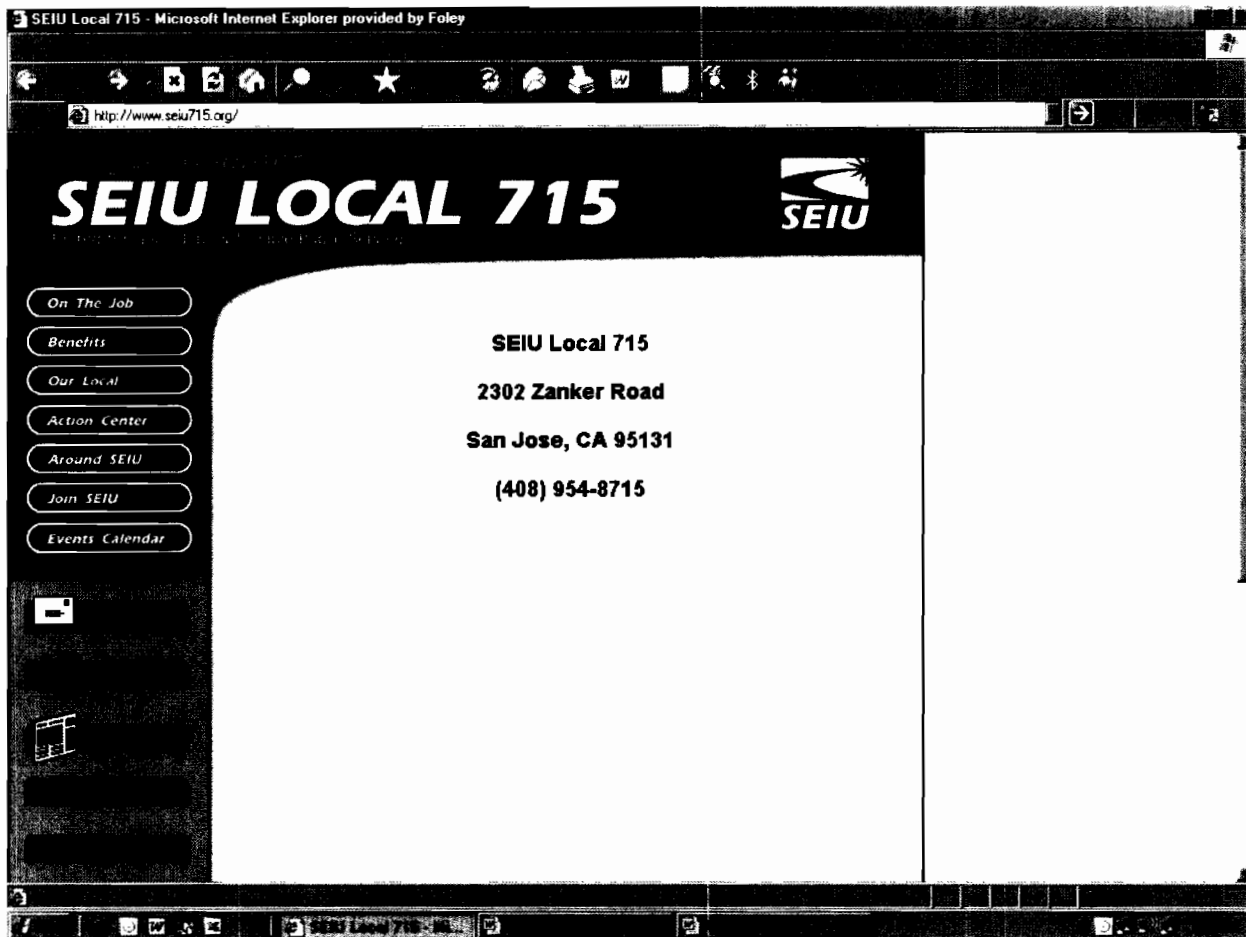
1 2008.

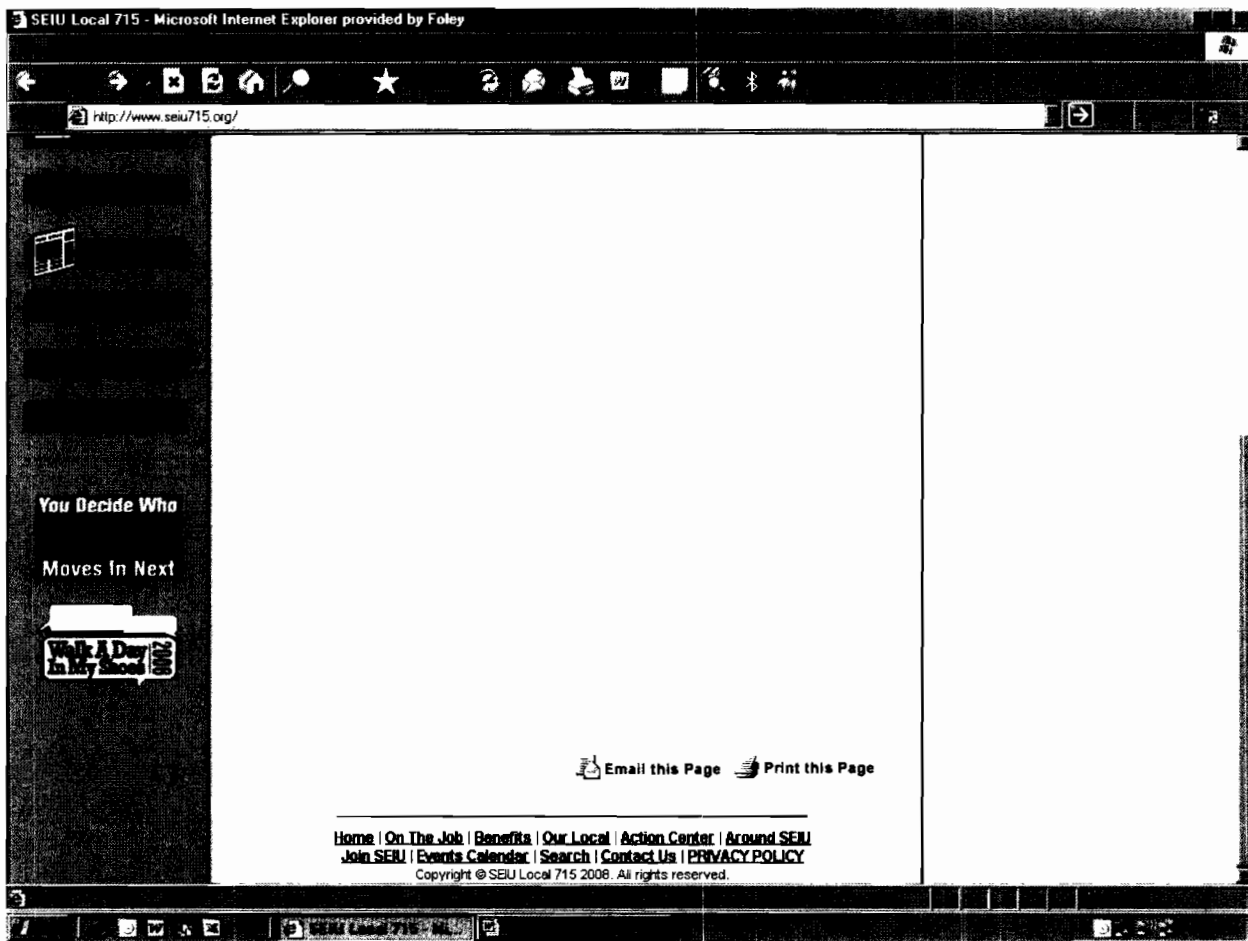
2 I declare under penalty of perjury under the laws of the State of California and the United
3 States of America that the foregoing is true and correct.

4 Executed on this 17th day of July, 2008 in San Francisco, California.
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10 SCOTT P. INCIARDI
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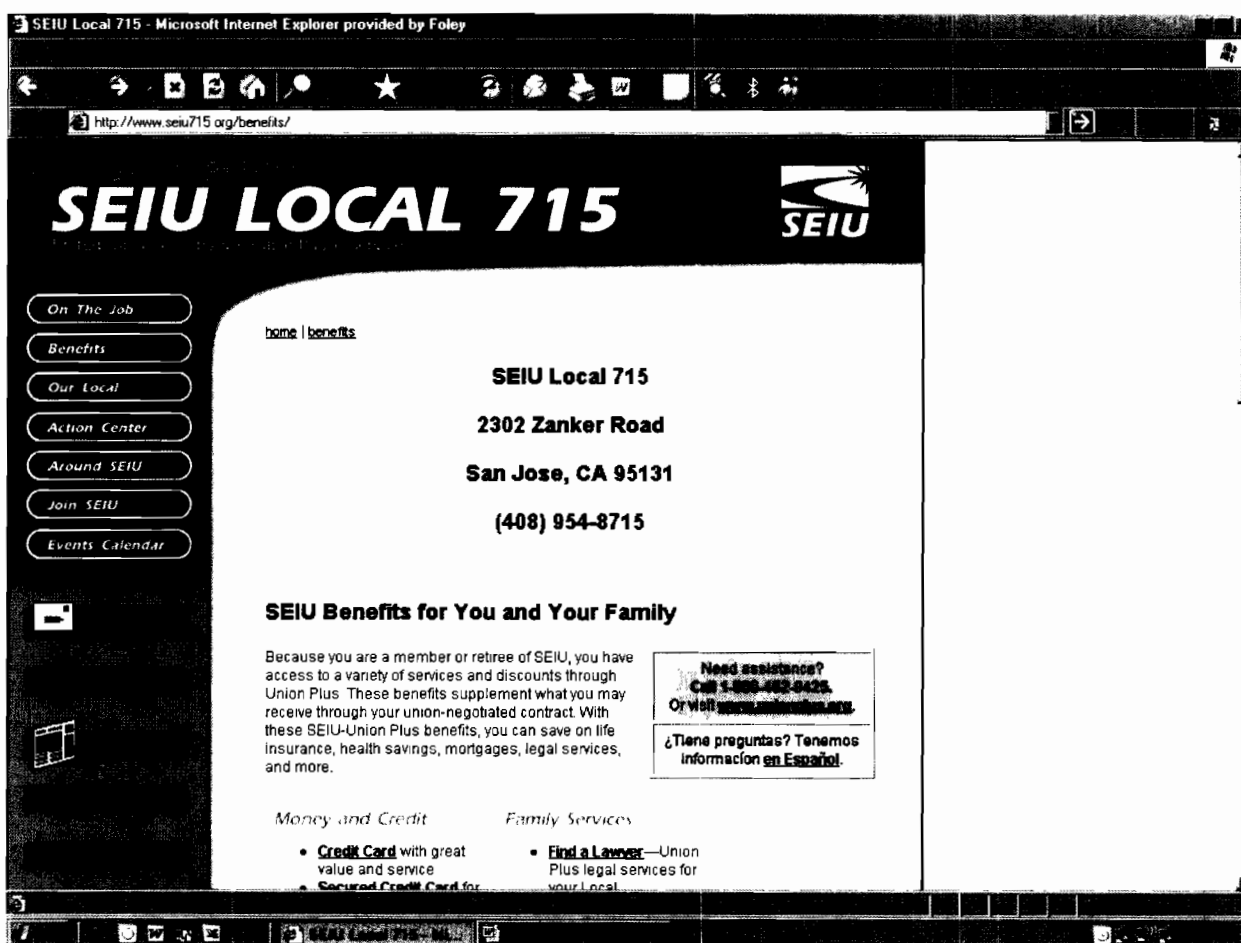
EXHIBIT A











SEIU Local 715 - Microsoft Internet Explorer provided by Foley

http://www.seiu715.org/benefits/

You Decide Who Moves In Next

Walk A Day In My Shoes

- **Secured Credit Card** for members who have poor credit or little or no credit history
- **Loans**—personal loans, lines of credit, and home equity loans
- **Credit Counseling** to help eliminate debt
- **Your Credit Score** for a 15% discount

House and Home

- **Mortgage and Real Estate**—low down payments and reduced closing costs
- **Home Heating Oil Discounts**—save on service contracts and fuel oil purchases
- **Moving Van Discounts**—Save on interstate moves, truck rentals, and storage

Insurance Protection

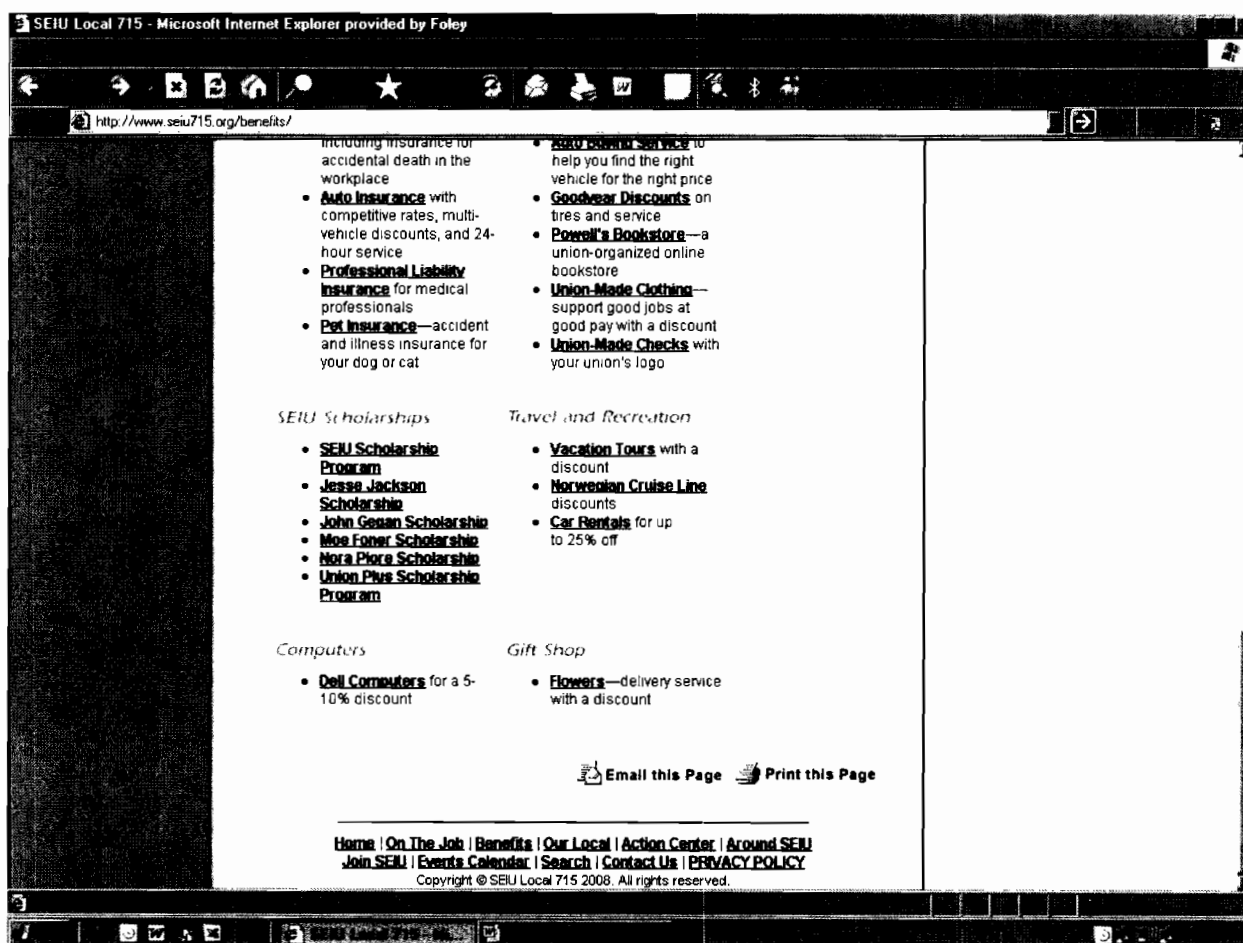
- **Life Insurance** protection regardless of job or health conditions
- **Accident Insurance** including insurance for accidental death in the workplace

Health and Well-Being

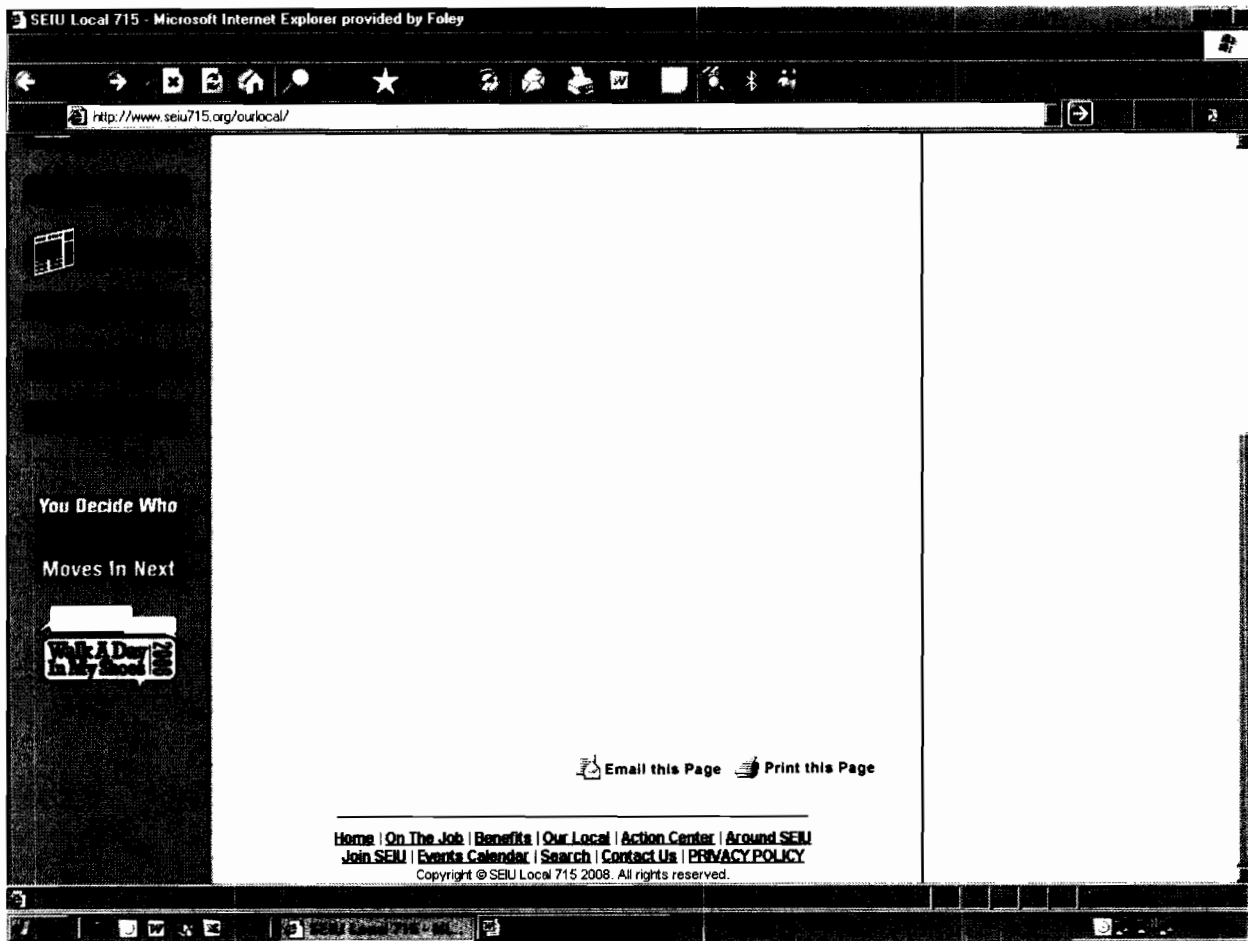
- **Immigration Legal Services** including free initial consultations and discounts on hourly rates
- **Planning for College**—resources on applying, paying, and more
- **Paying for College**—resources include loans, financial aid, and savings plans
- **Pet Health**—savings on veterinary services for all animals
- **Health Savings** reduces out-of-pocket expenses for prescriptions, vision, and other services
- **Health Club Discounts** at more than 1,500 locations

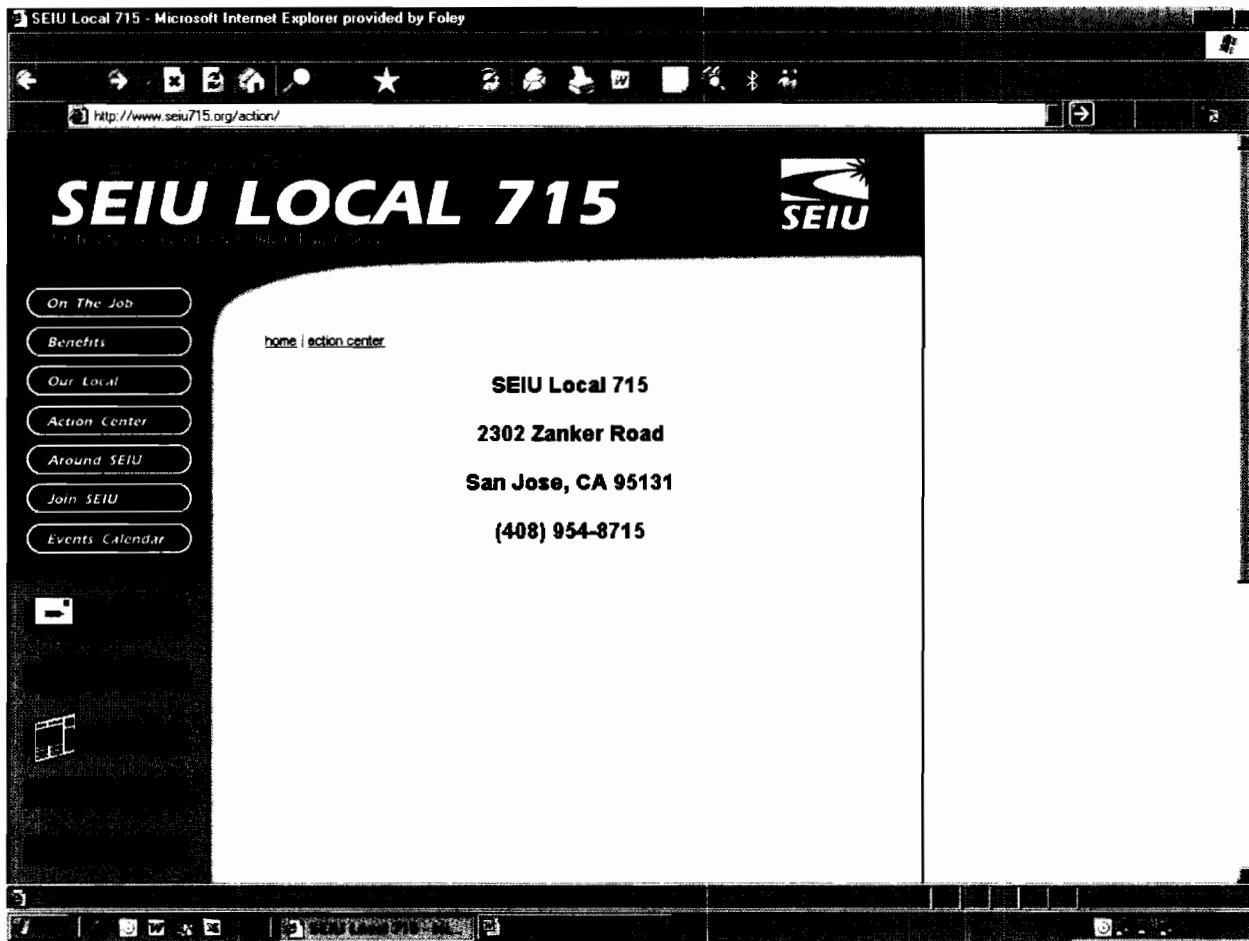
Union Marketplace

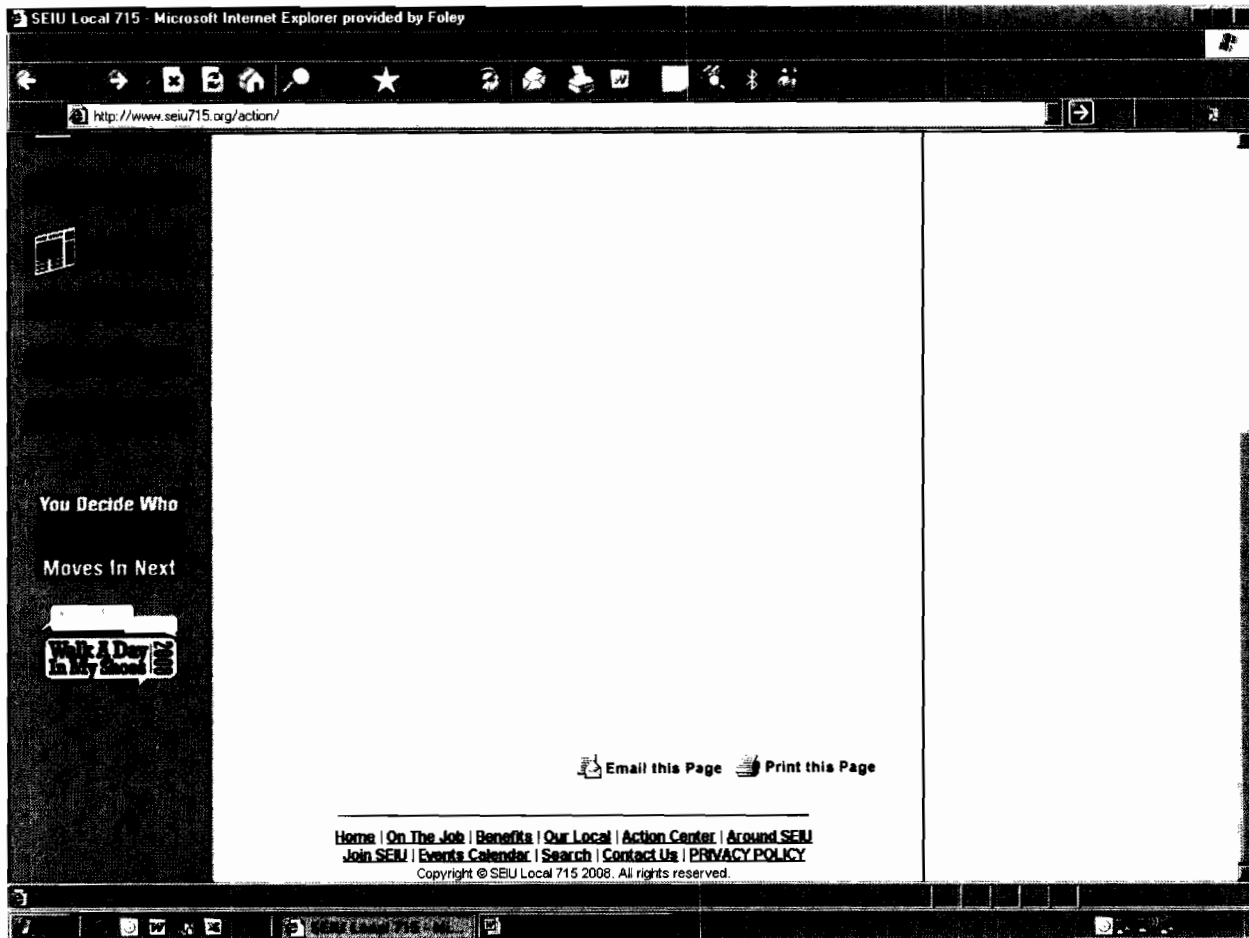
- **Cingular Wireless Discounts** on monthly service for union members
- **Auto Buying Service** to help you find the right vehicle for the right price

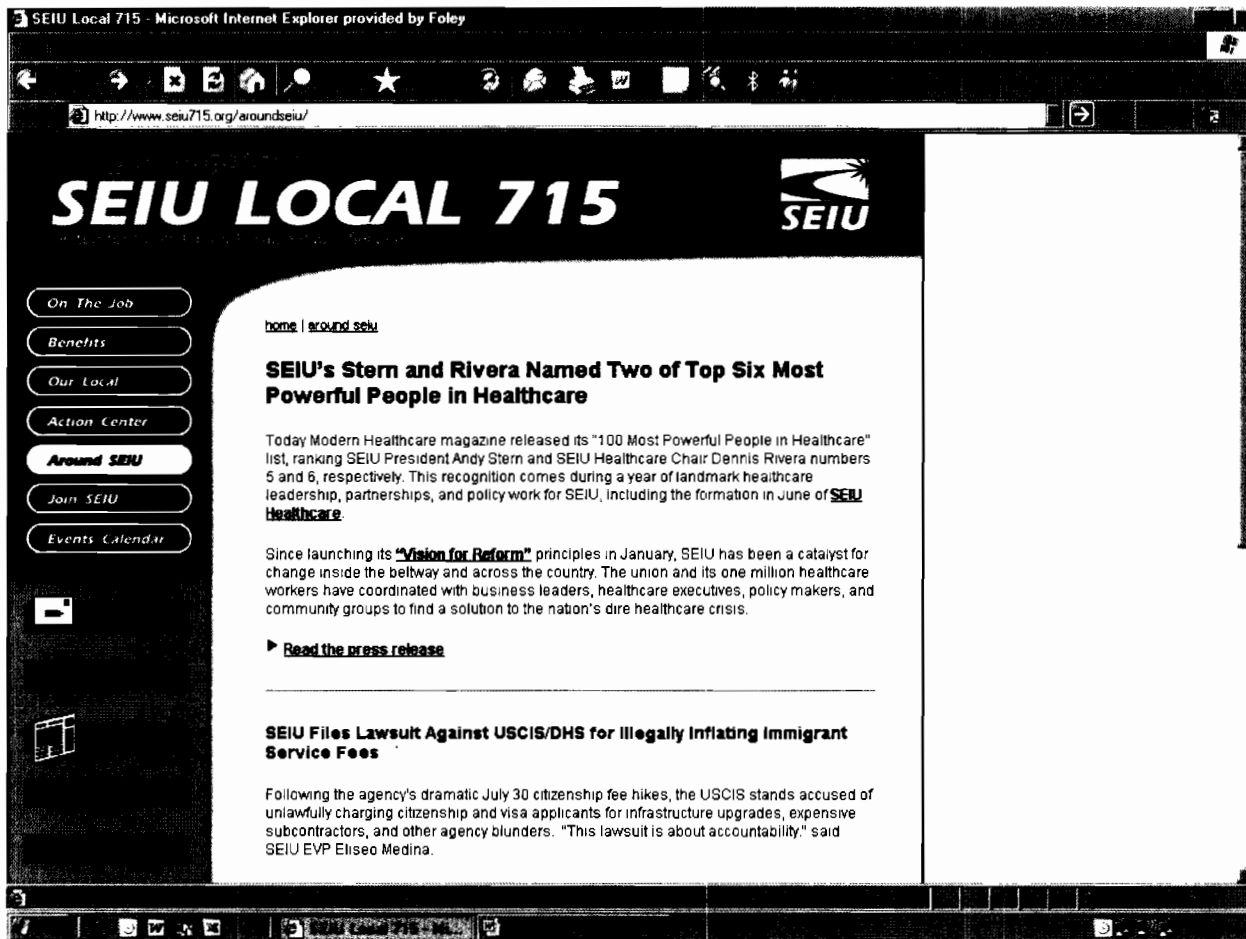


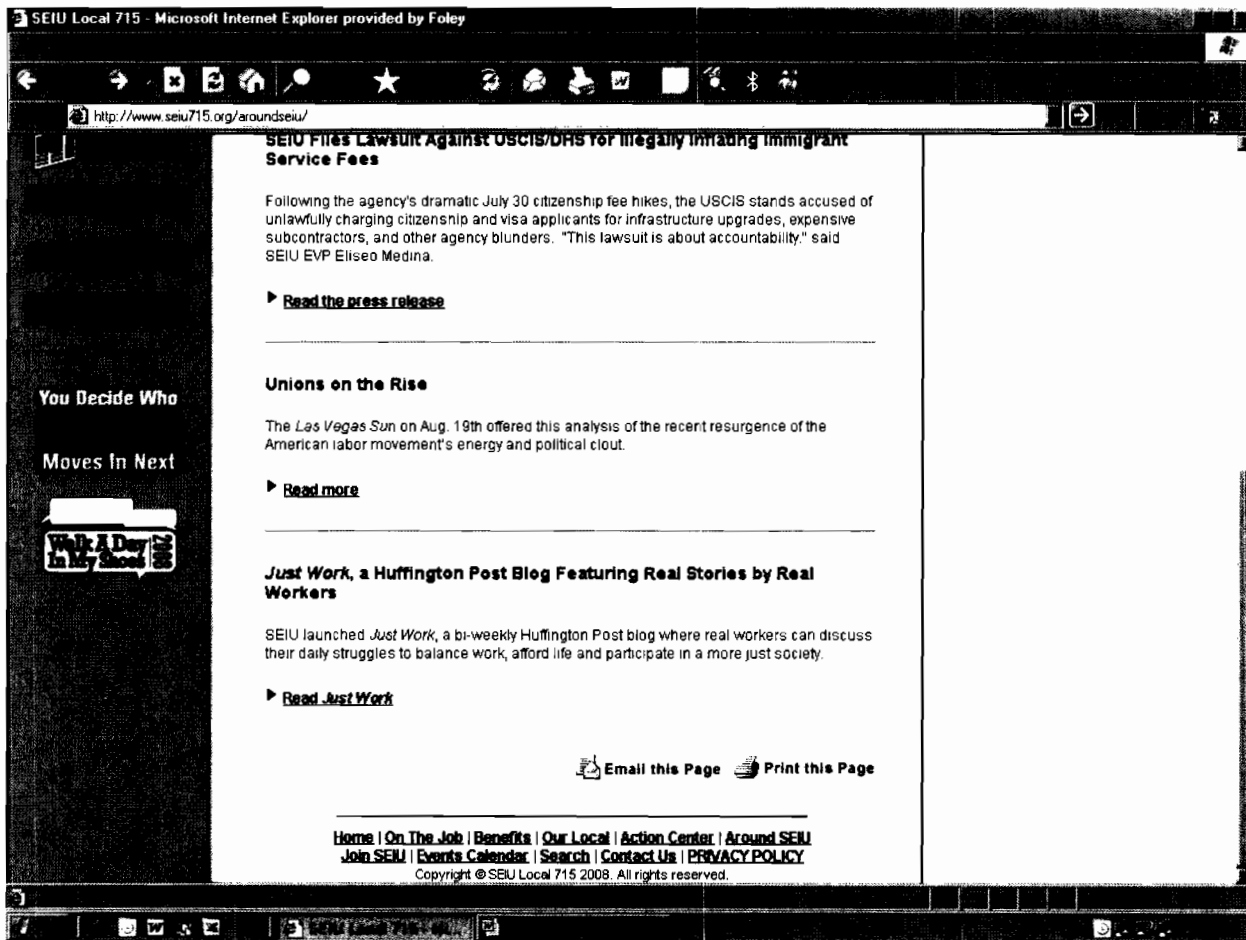


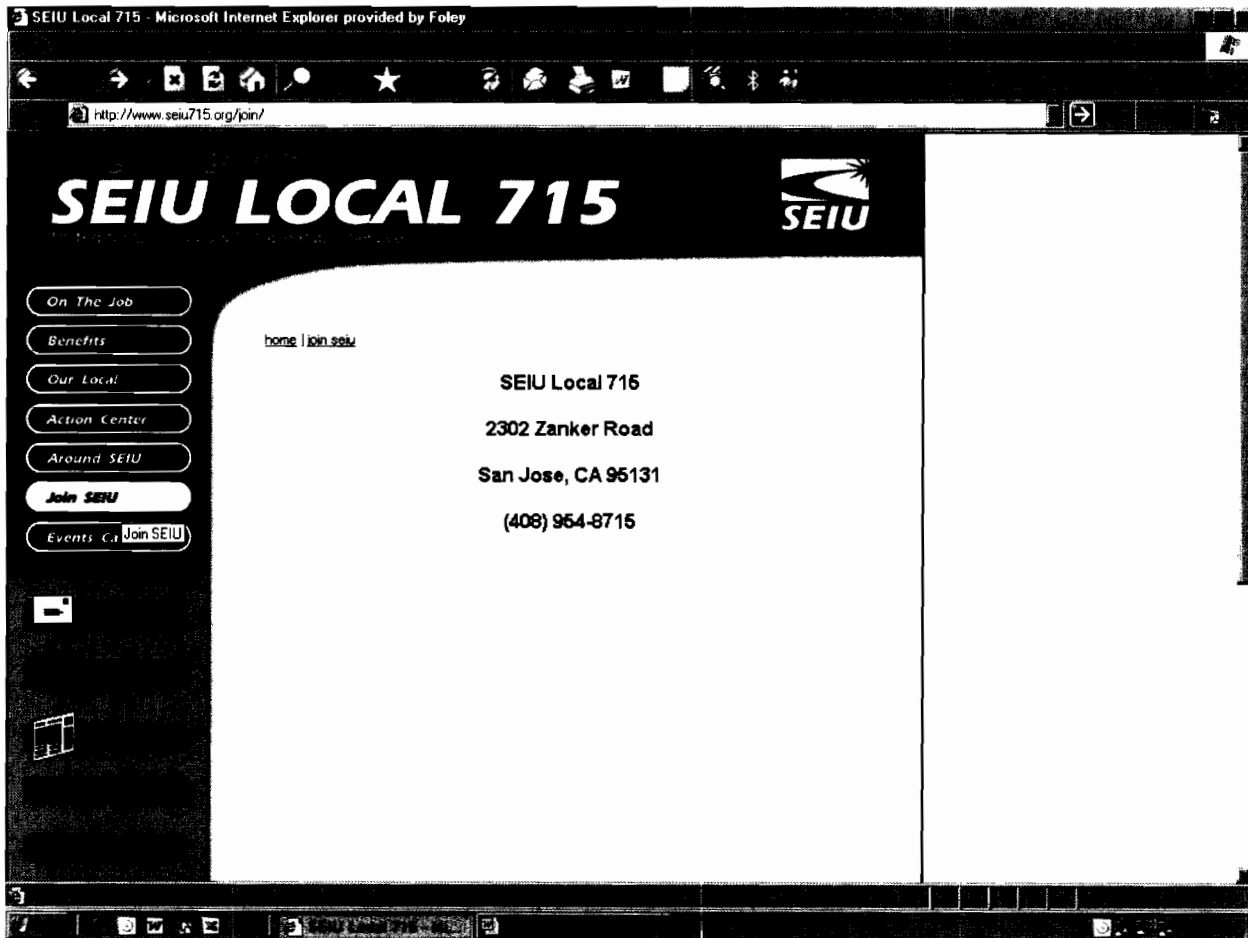


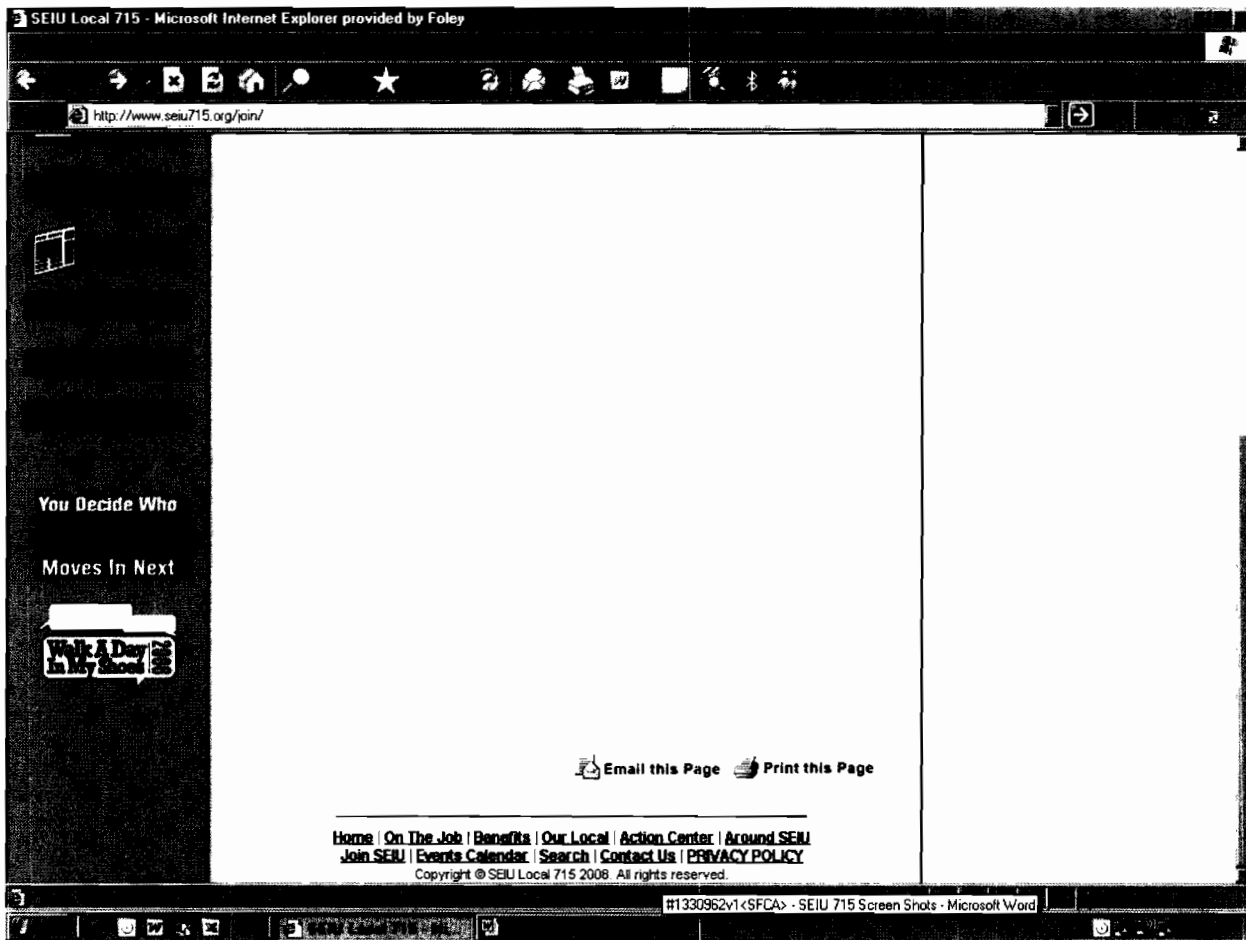












SEIU Local 715 - Microsoft Internet Explorer provided by Foley

Http://www.seiu715.org/calendar/

SEIU LOCAL 715

SEIU

On The Job
Benefits
Our Local
Action Center
Around SEIU
Join SEIU
Events Calendar

[home](#) | [events calendar](#)

select a month | year | **GO**

[previous](#) **March 2008** [next](#)

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
		Child & Human Rights Committee Meeting				
		Education & Training Committee Meeting				
		COPE Committee				
9	10	11	12	13	14	15
16	17	18	19	20	21	22
		SUB Committee Meeting - 5:30am				

SEIU Local 715 - Microsoft Internet Explorer provided by Foley

http://www.seiu715.org/calendar/

Education & Training Committee Meeting

COPE Committee

9	10	11	12	13	14	15
16	17	18	19	20	21	22

SUB Committee Meeting - 5:30pm Boardroom

23	24	25	26	27	28	29
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MOC Meeting

30	31
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Cesar Chavez Day - Office Closed

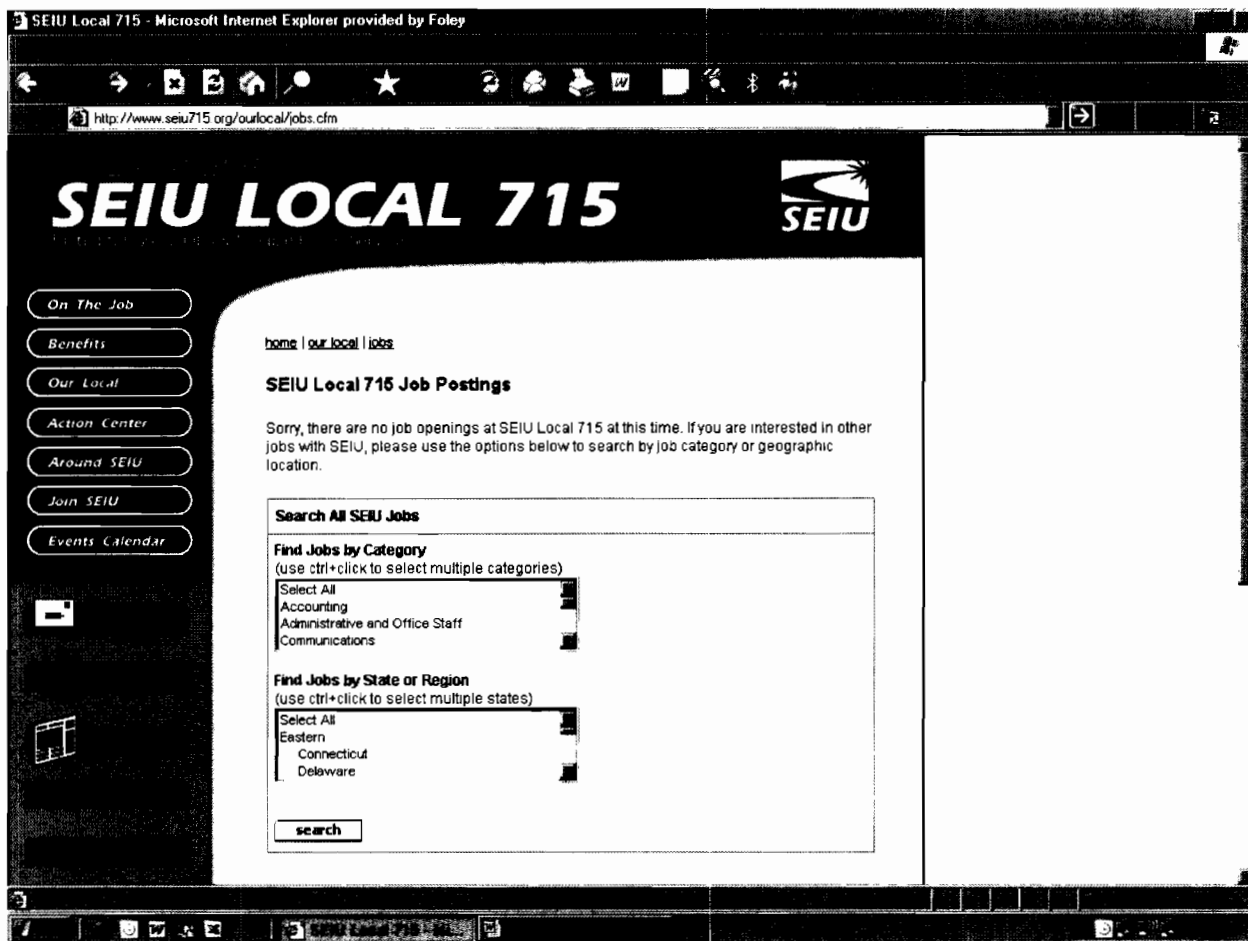
You Decide Who Moves In Next

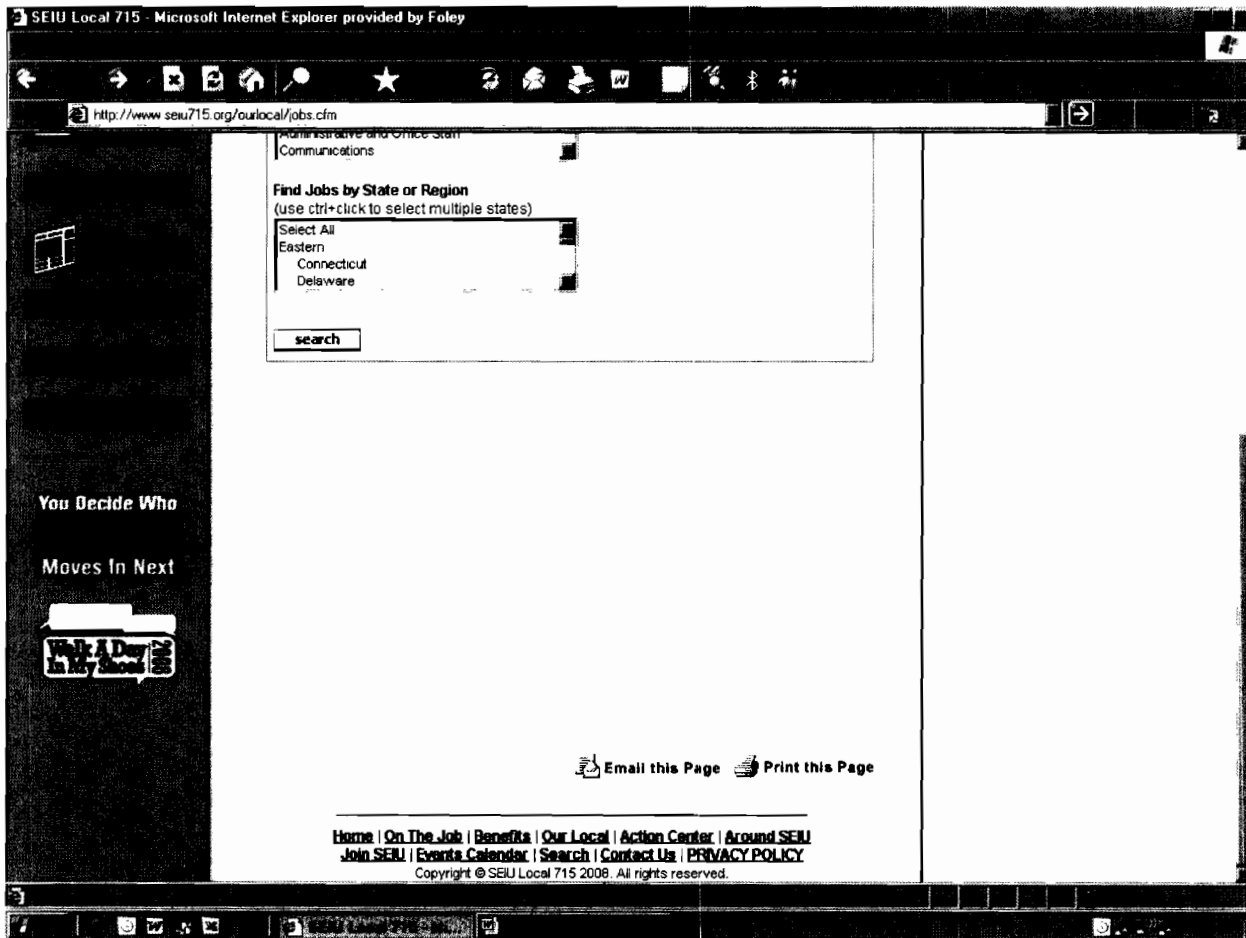
What A Day In My Shoes

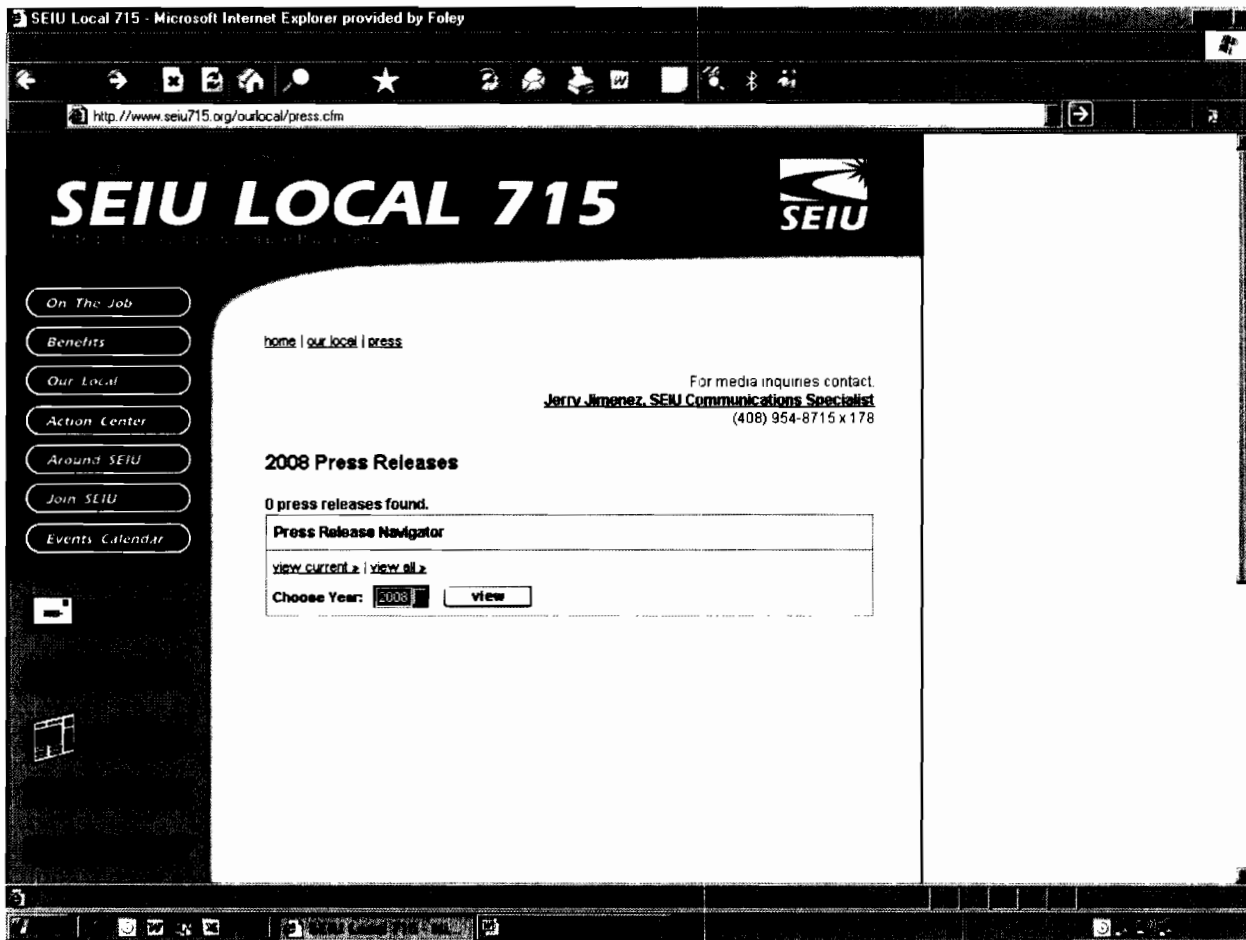
Email this Page Print this Page

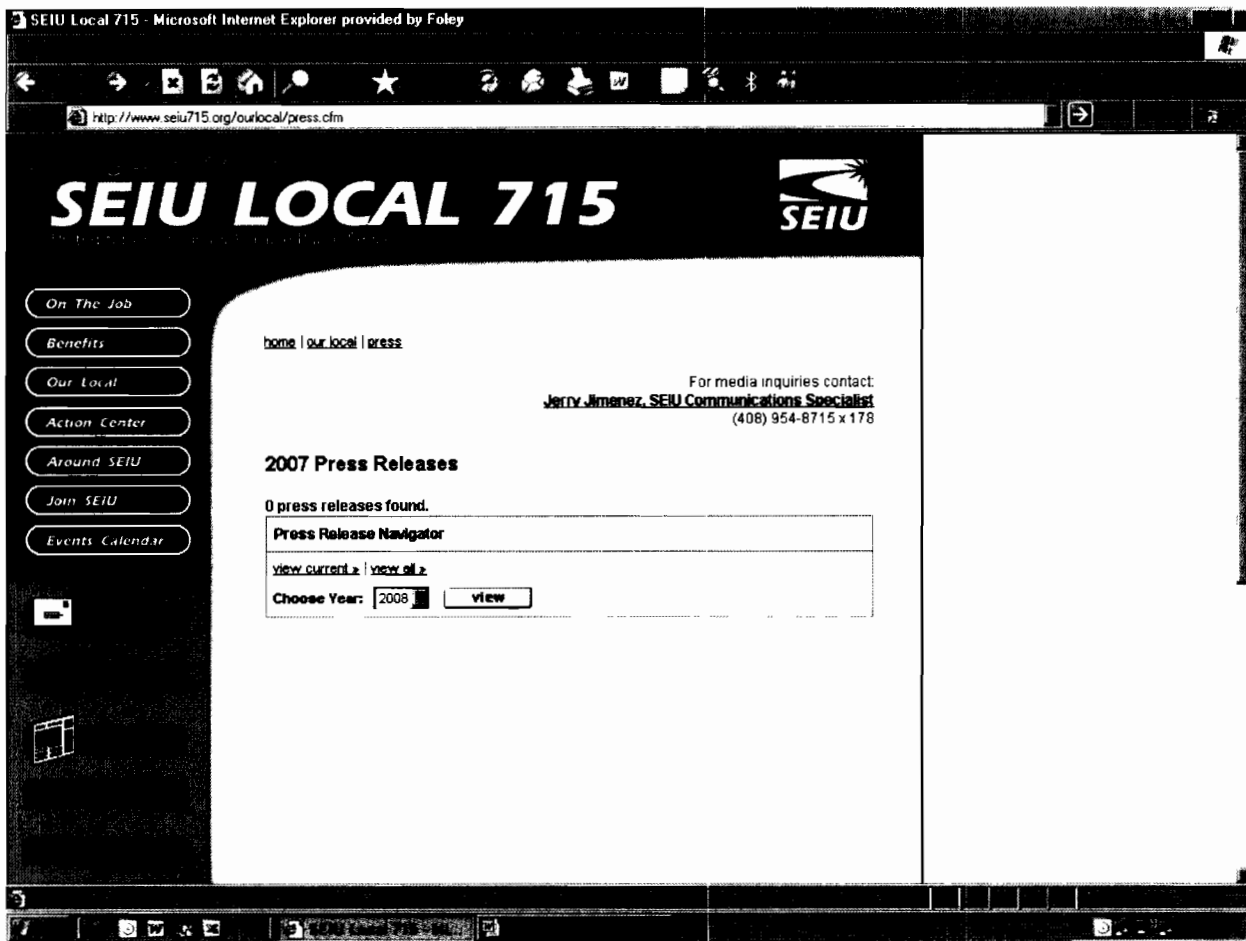
Home | On The Job | Benefits | Our Local | Action Center | Around SEIU
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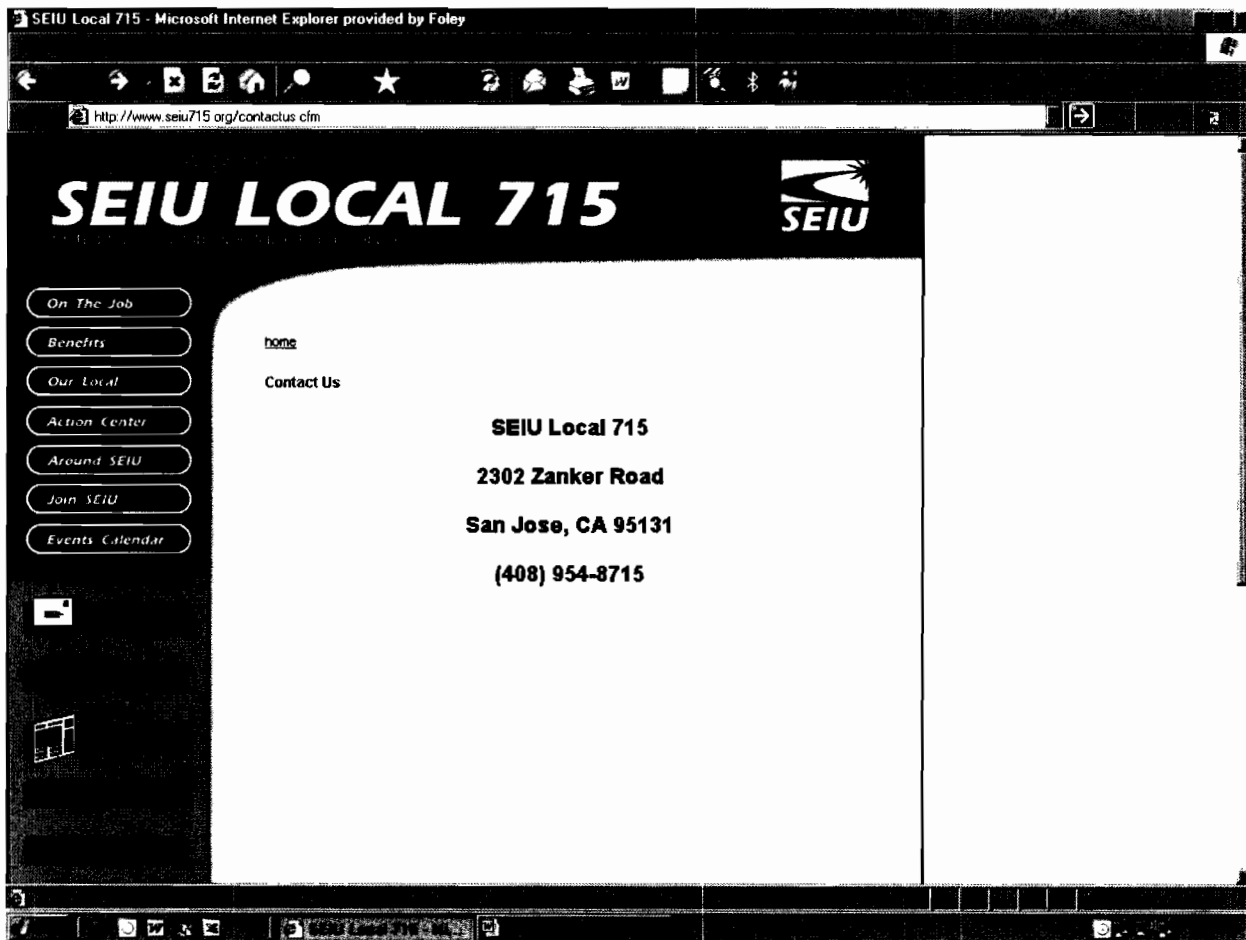
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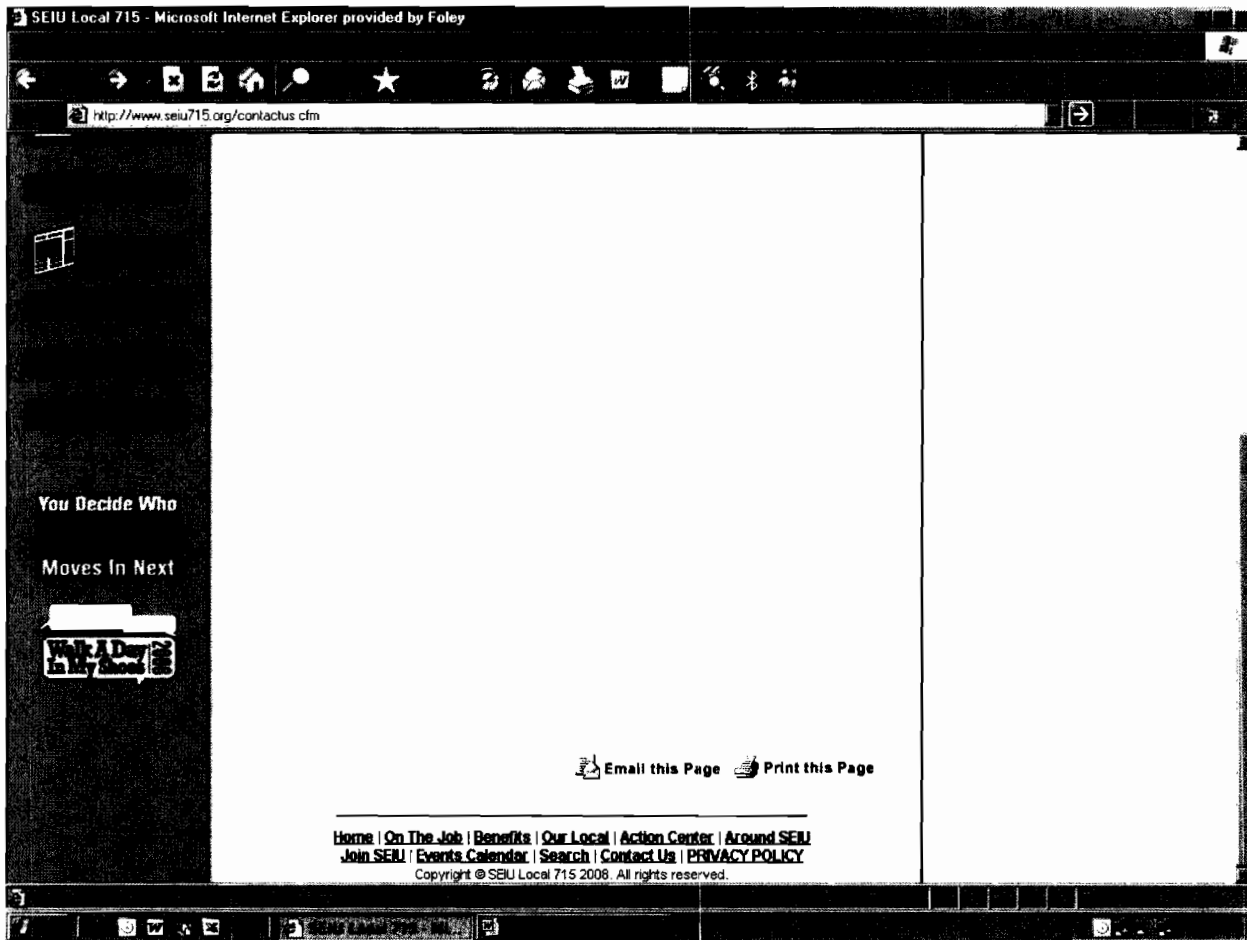
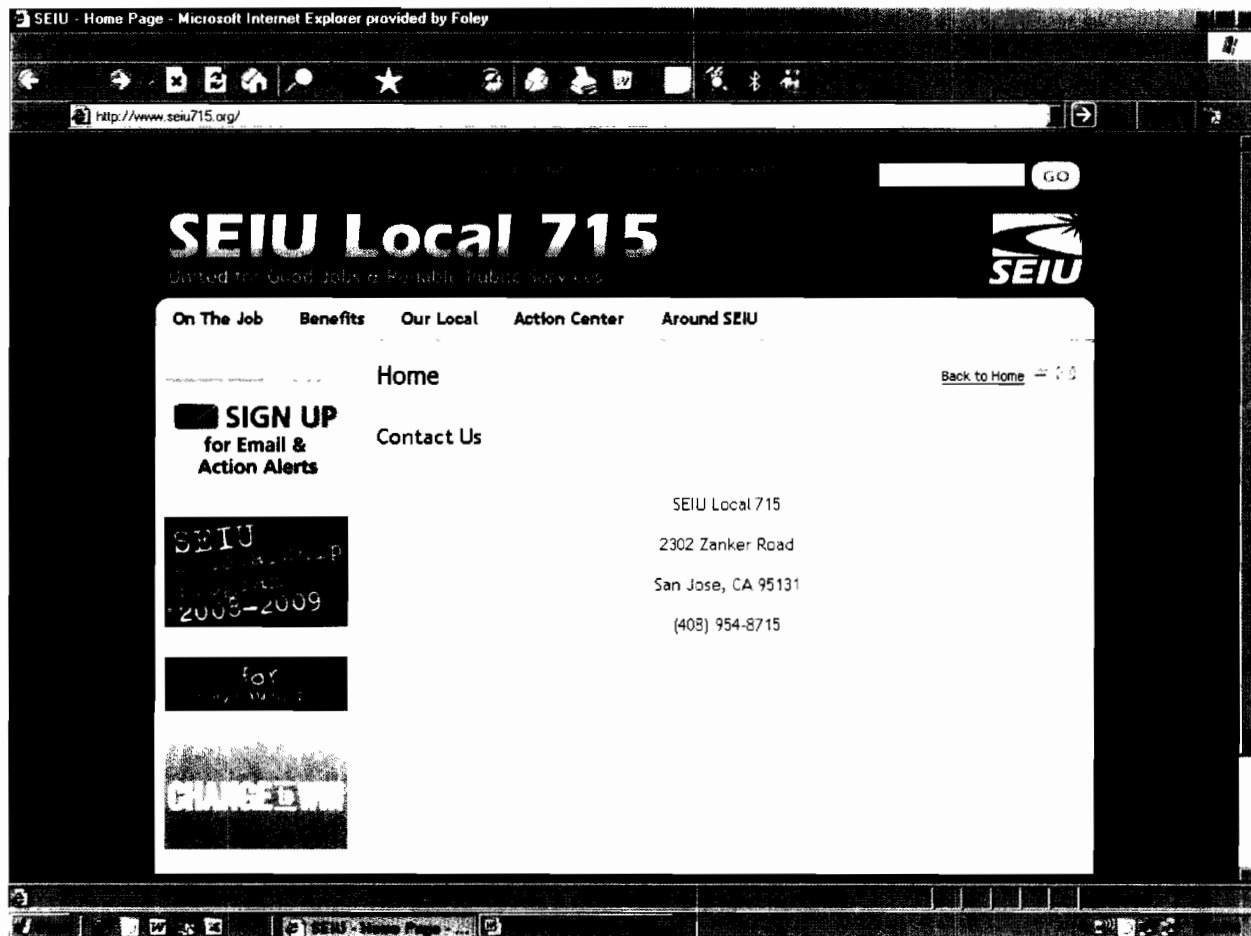
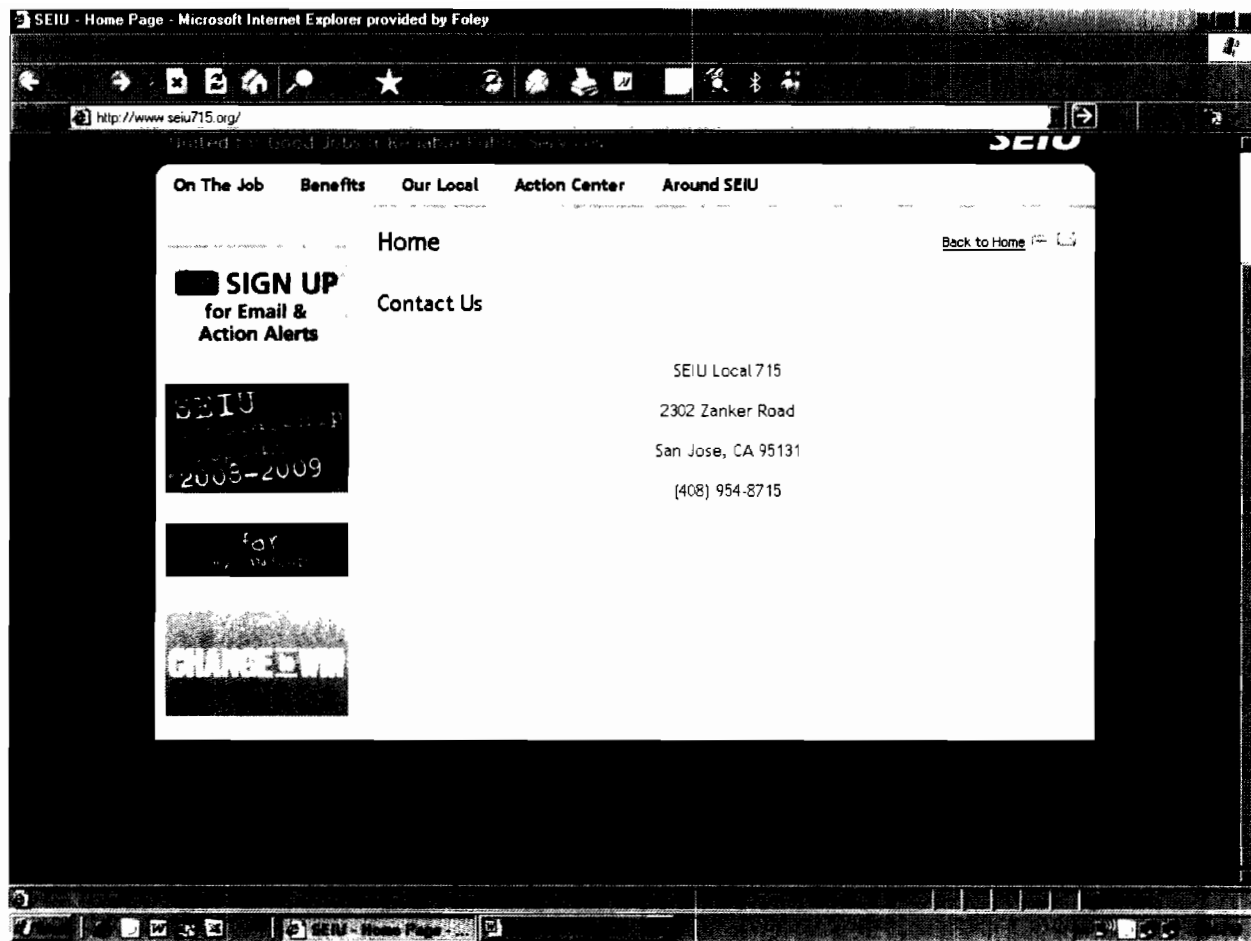
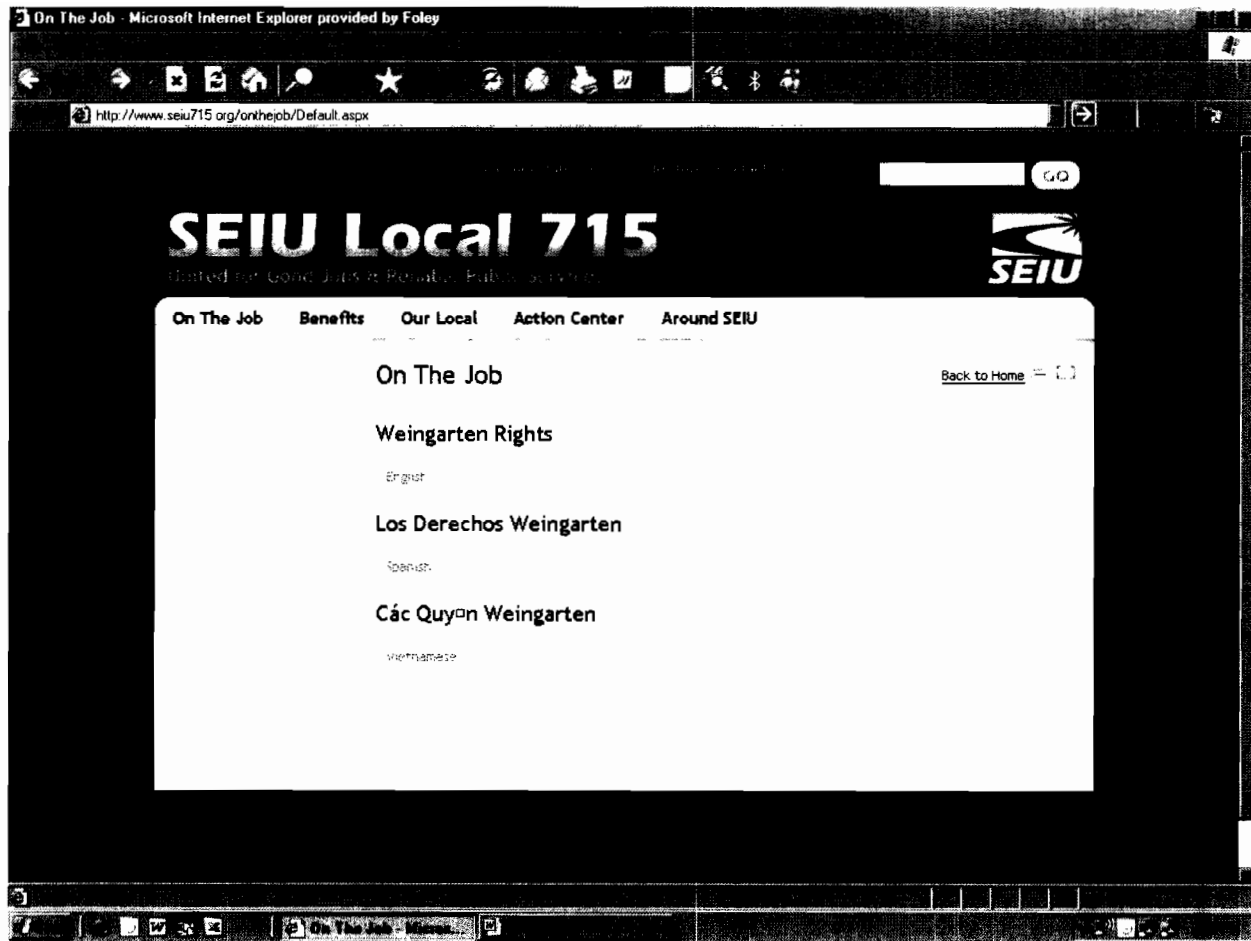


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SEIU Local 715

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Benefits

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San Jose, CA 95131
(408) 954-8715

Because you are a member of SEIU, you have access to a variety of services and discounts through Union Plus. These benefits supplement what you may receive through your union-negotiated contract with the SEIU Union Plus benefits. For more information, visit [www.unionplus.org](#).

Need assistance?
Call 1-800-432-9425.
 Or visit [www.unionplus.org](#).

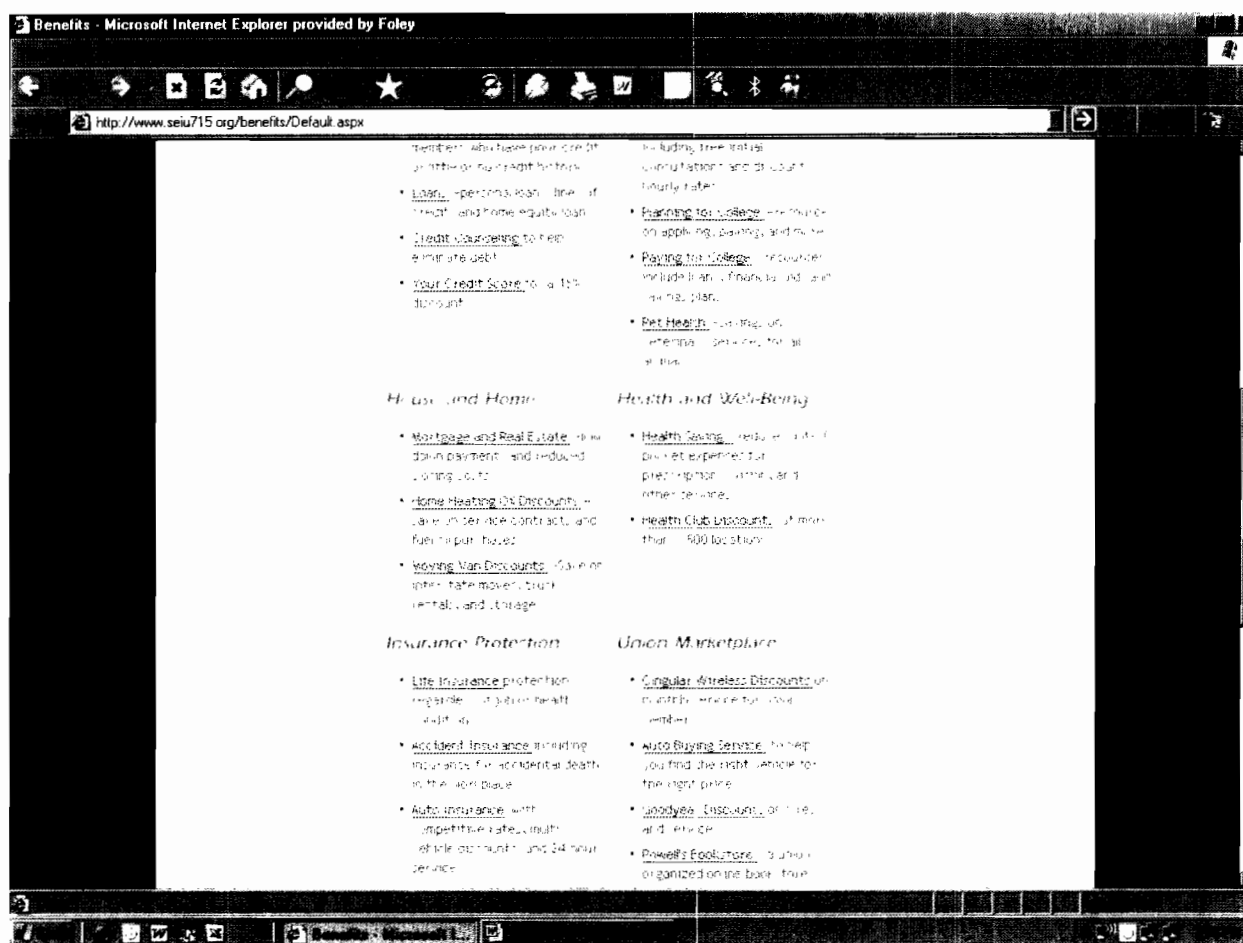
¿Tiene preguntas? Tenemos información en Español

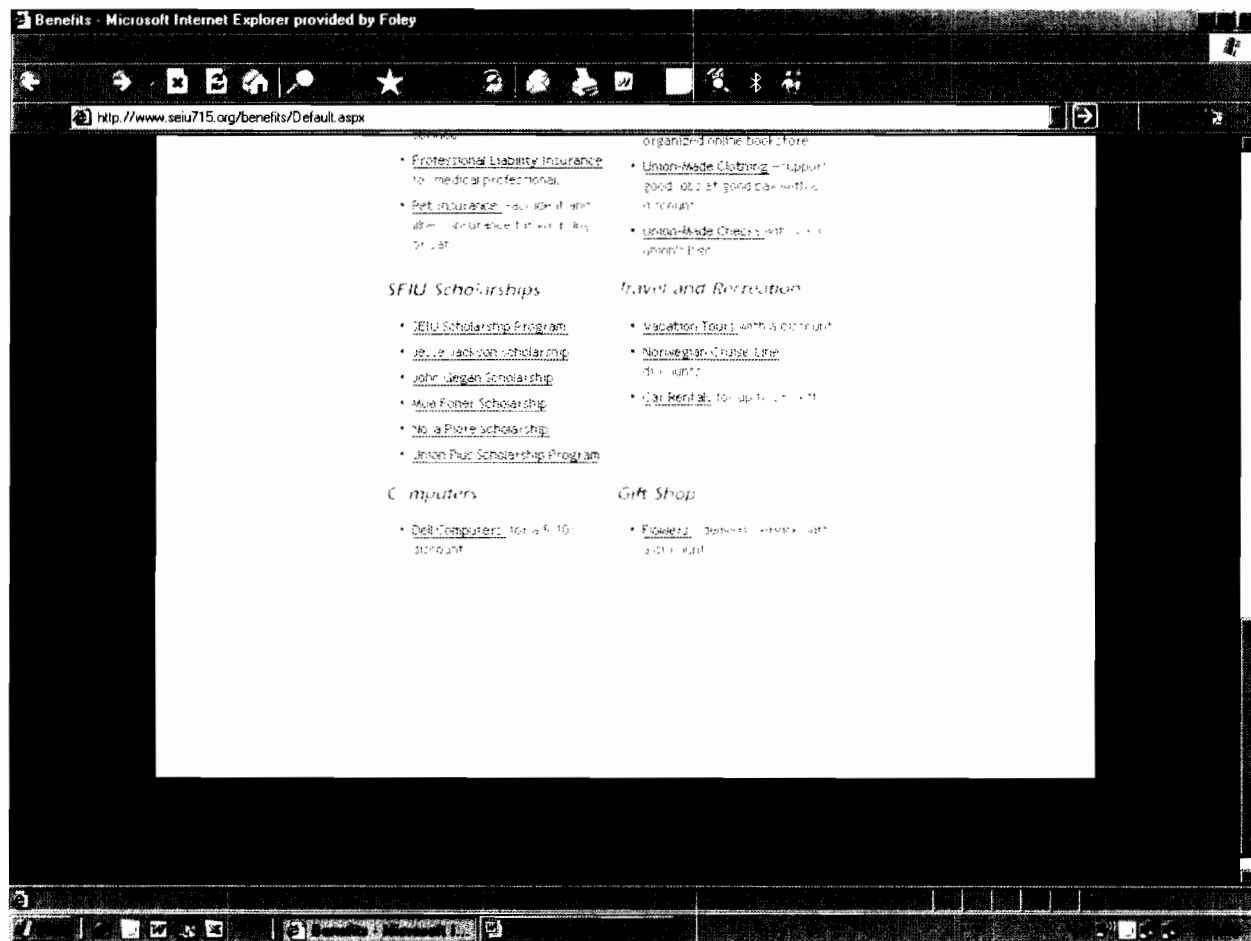
Money and Credit

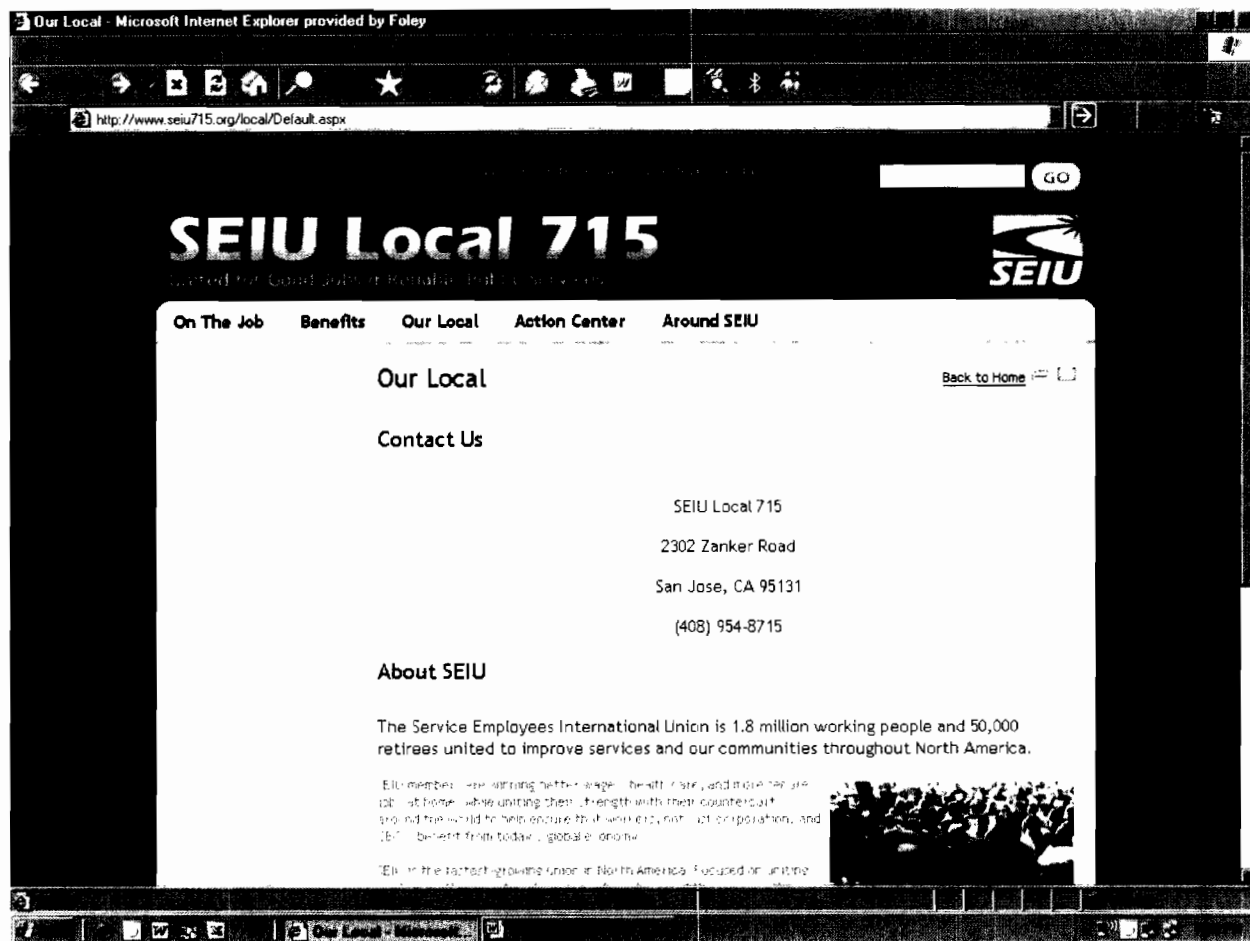
- [Credit Card](#) with great value and service
- [Secured Credit Card](#) for members who have poor credit

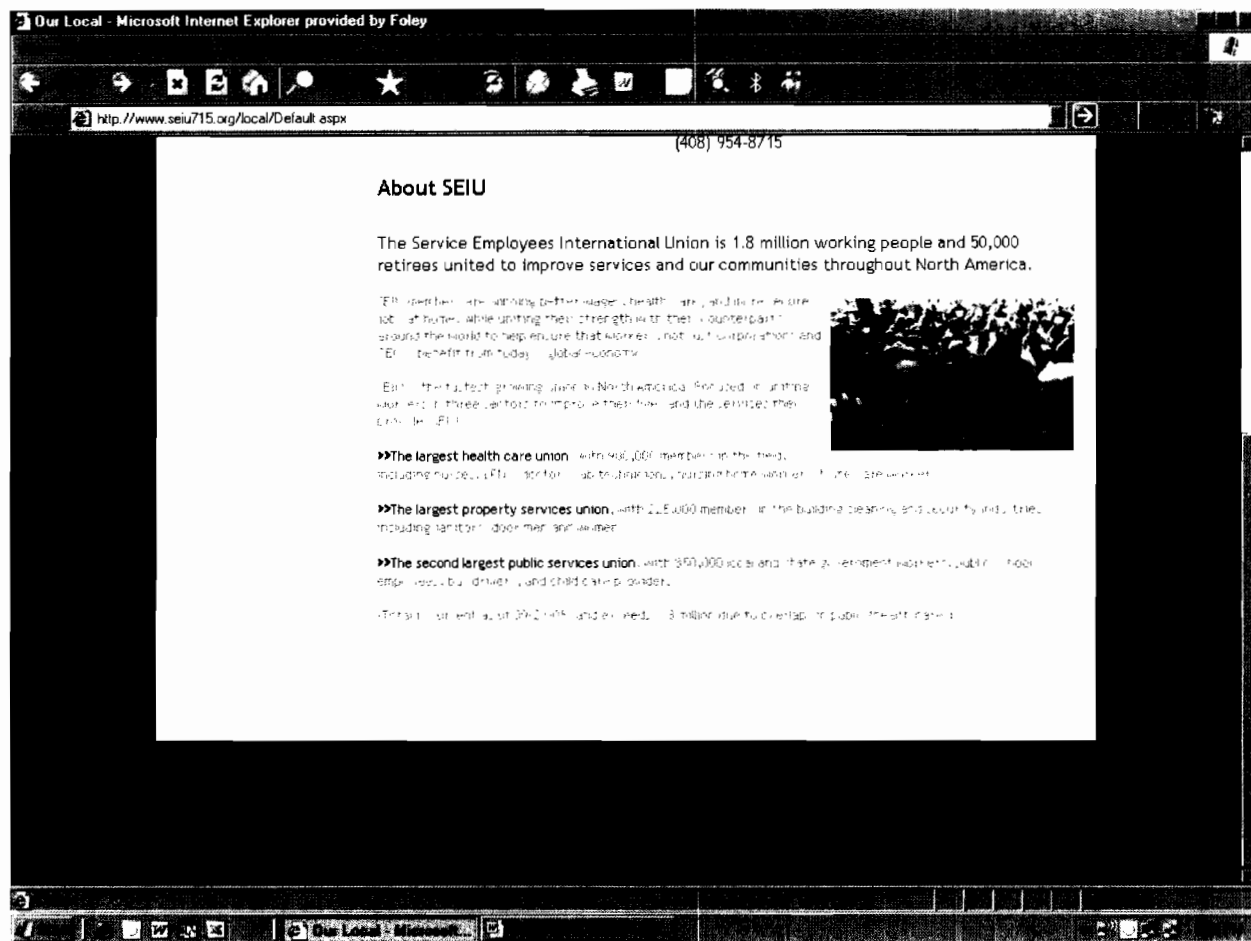
Family Services

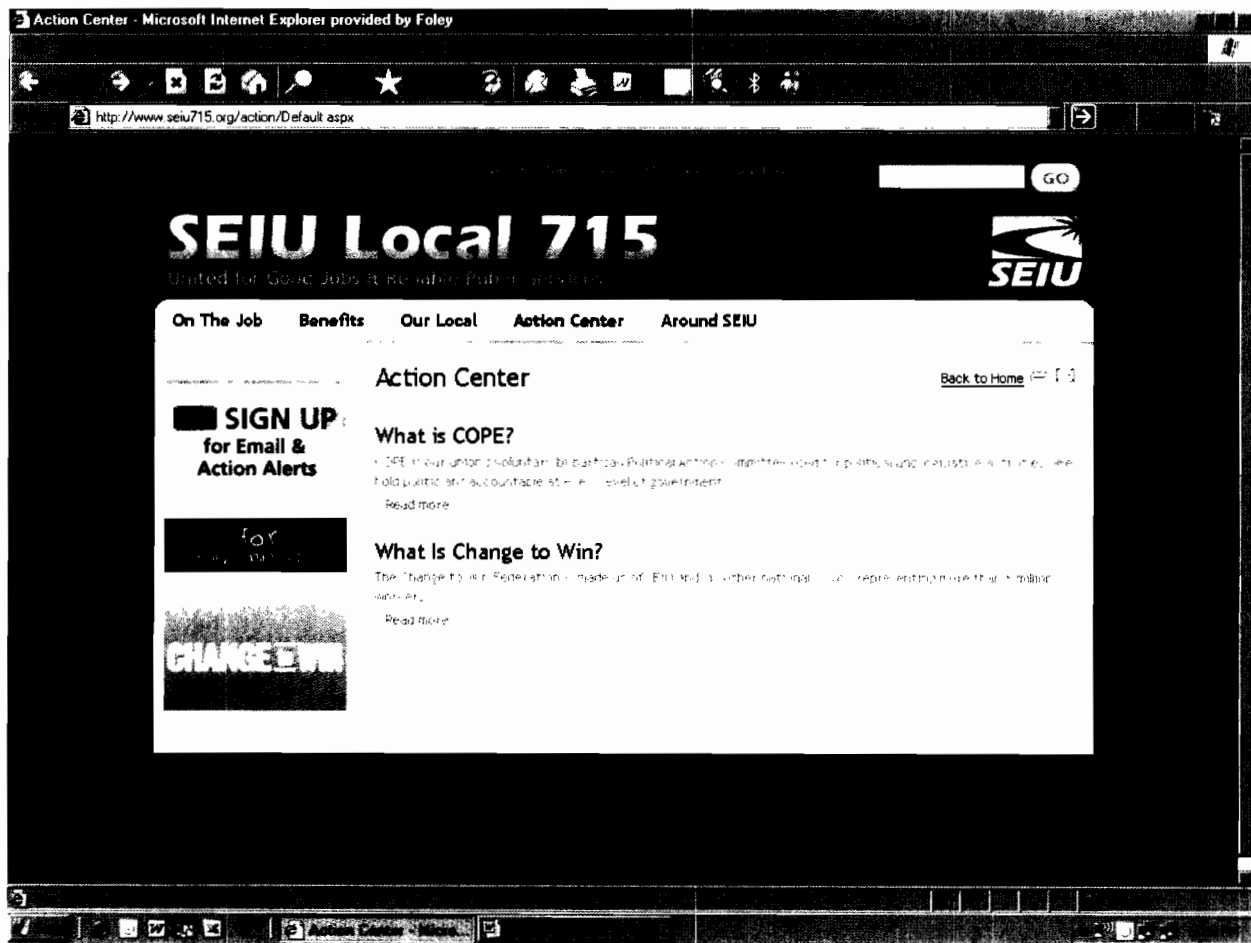
- [Find a Lawyer](#), Union Plus offers advice for your trial
- [Immigration Legal Services](#) including free initial

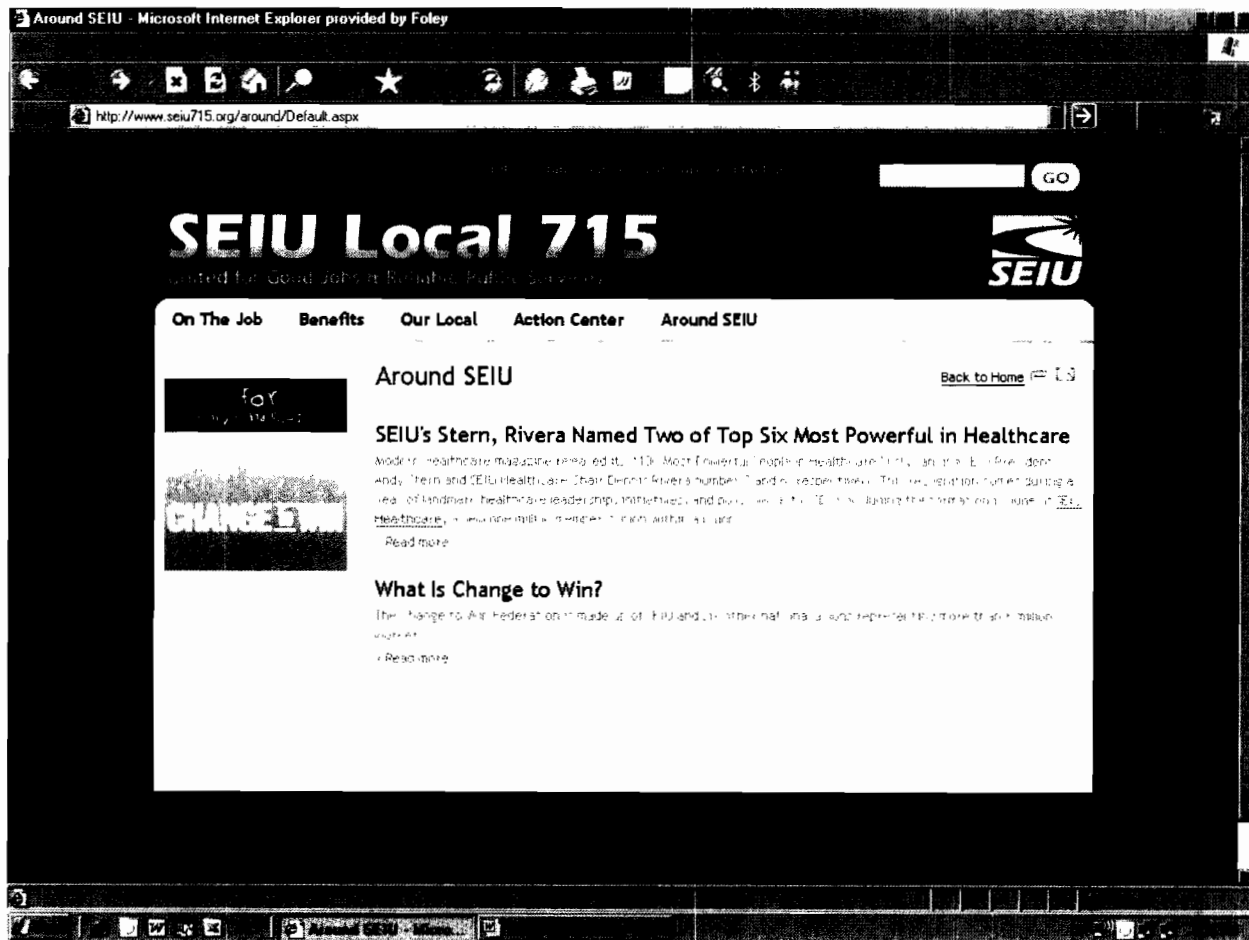


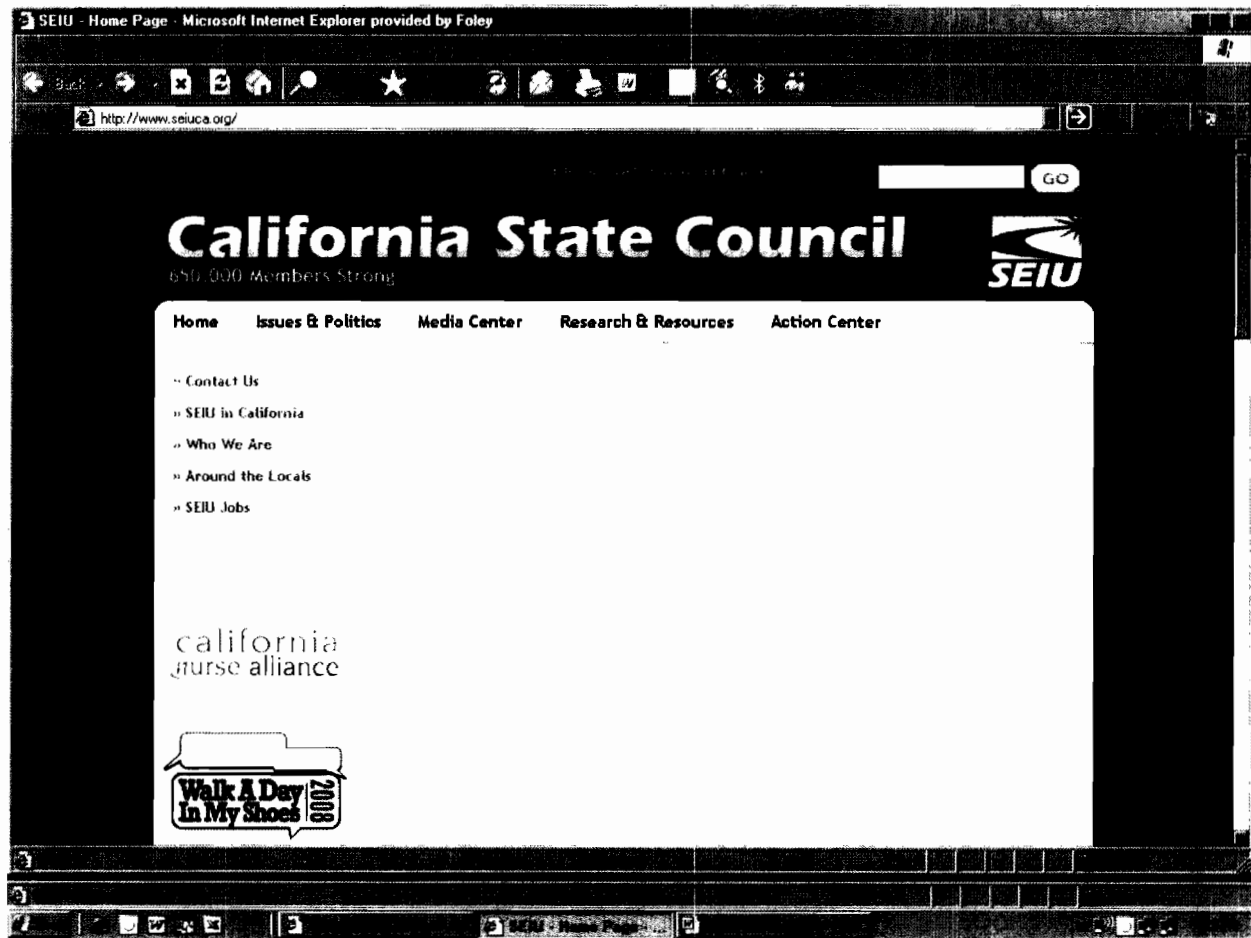














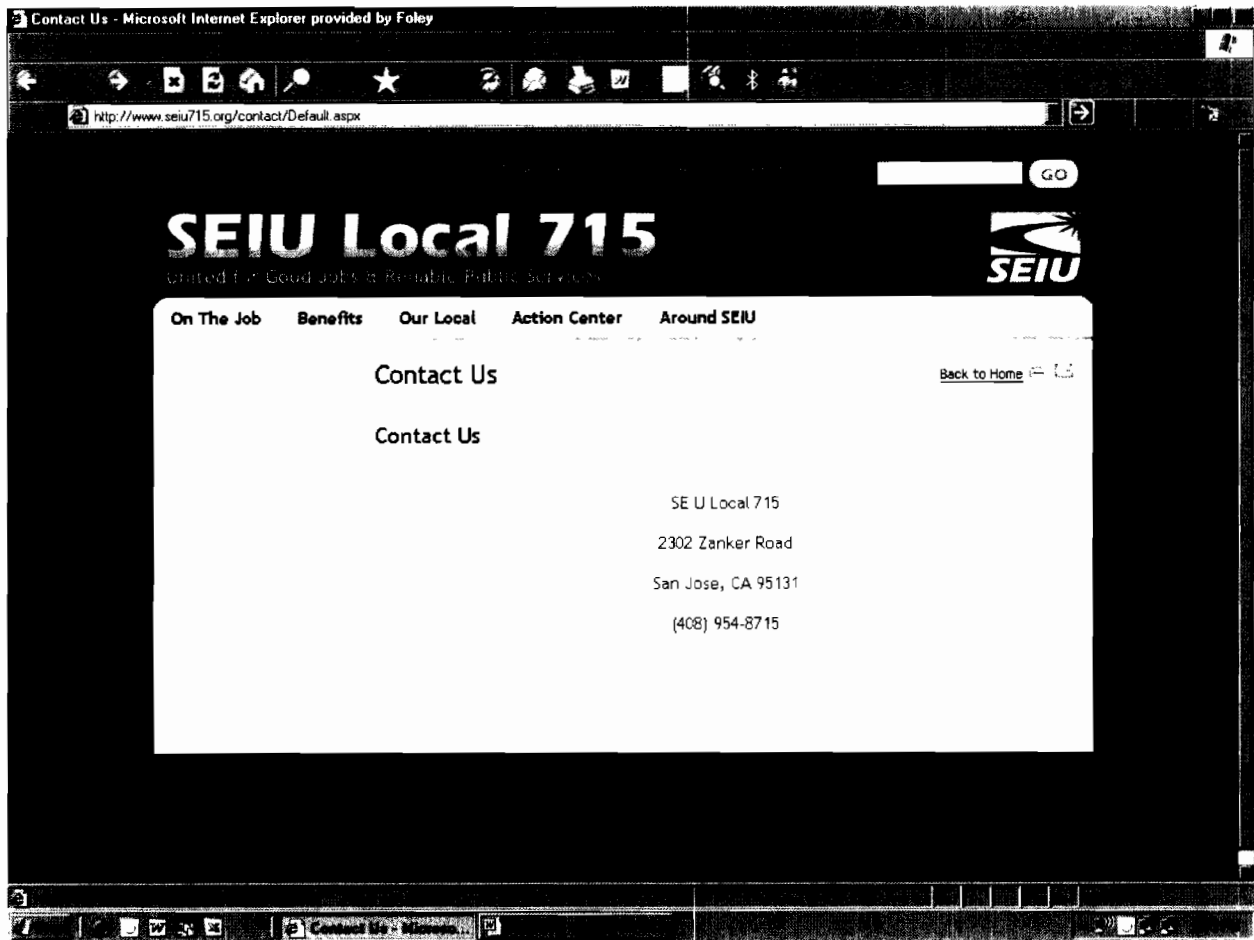


EXHIBIT C



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United Healthcare Workers
UHW

United for Quality Healthcare

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List of 2008 Contracts to be Renewed

SEIU Targets 2008 Contracts with Hospitals
Nursing homes
10/14/2007

Union Locals Band Together to Seek Common
Working Conditions
08/20/2007

SEIU Health Care Locals Begin Work on
Coordinated Bargaining in Six States
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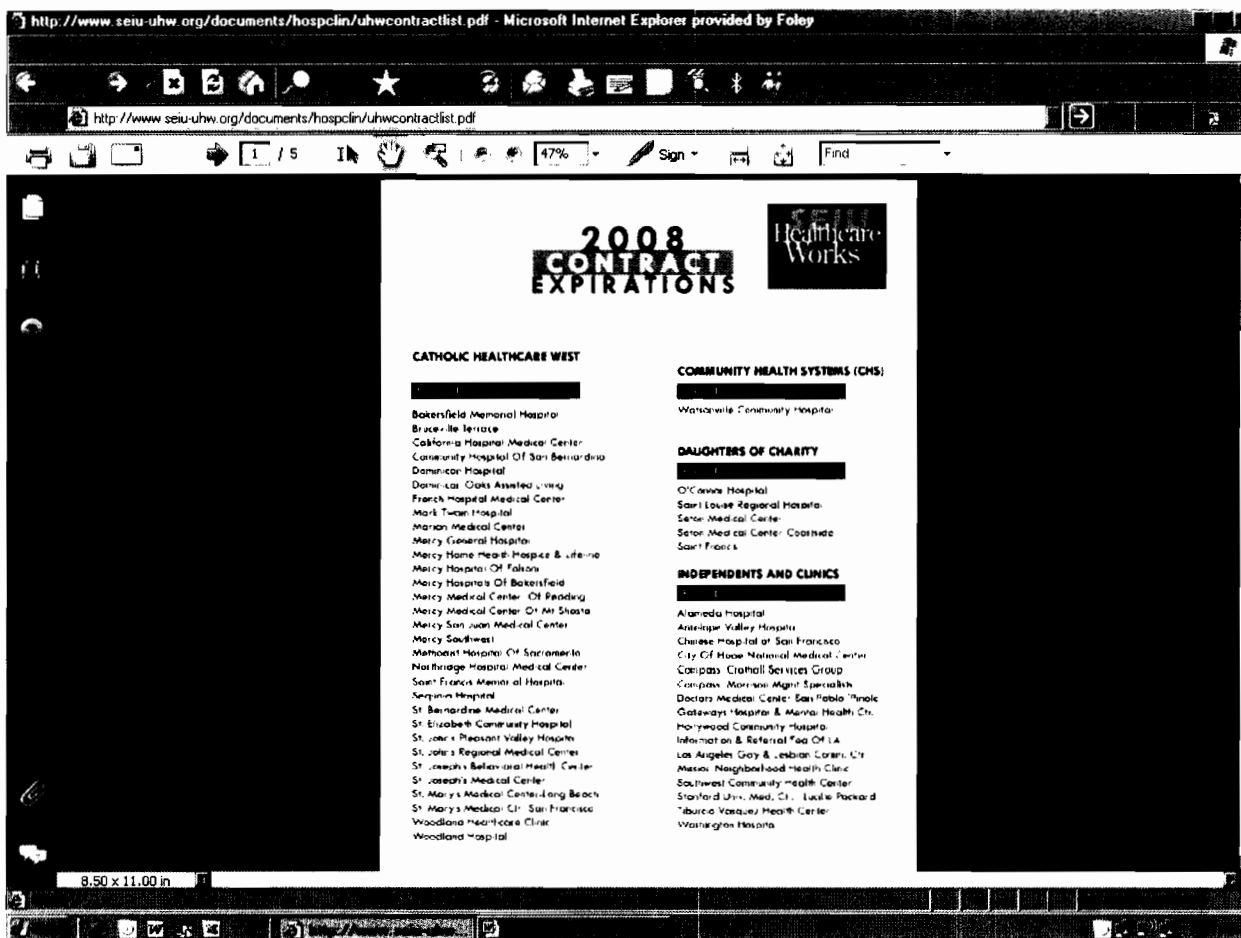
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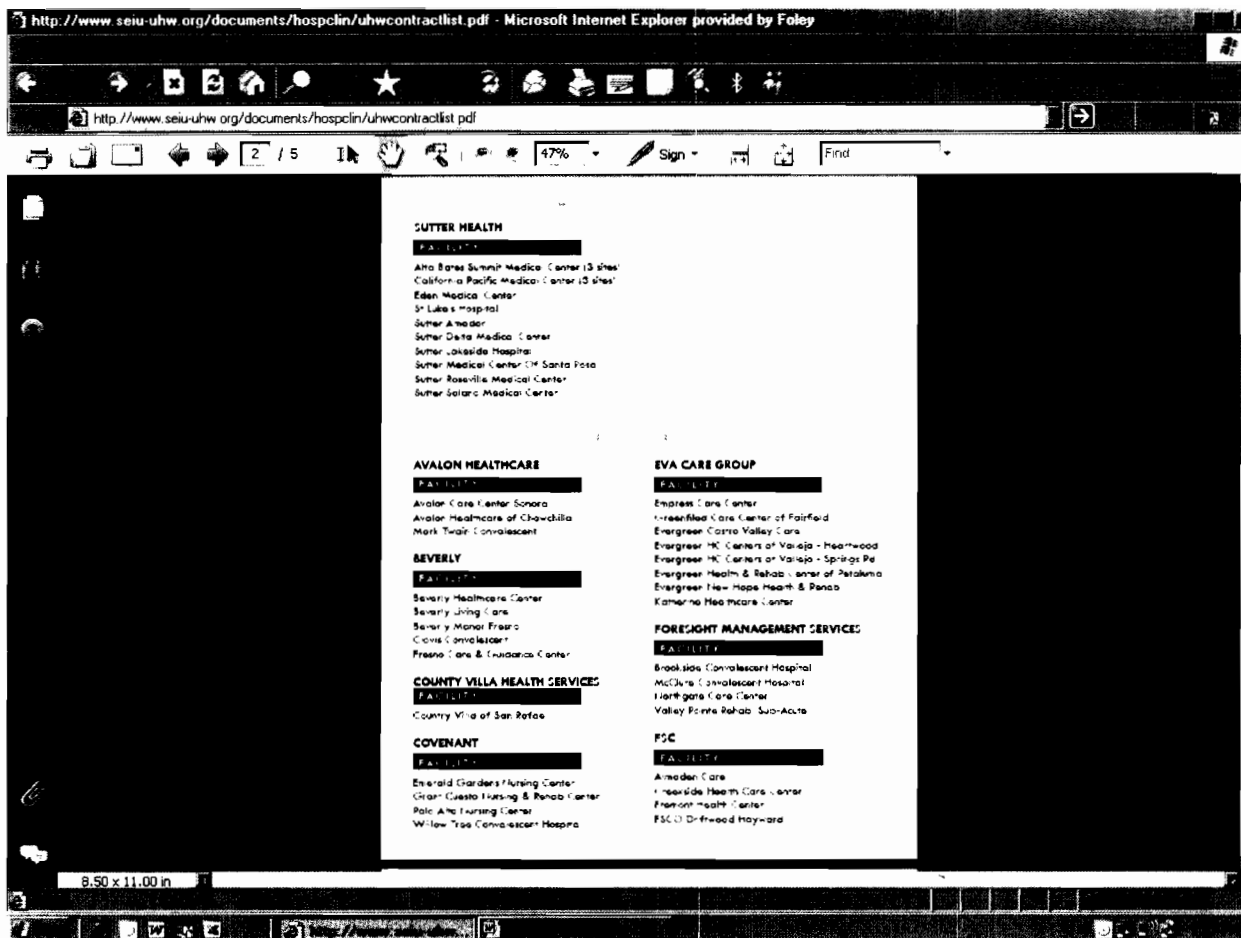
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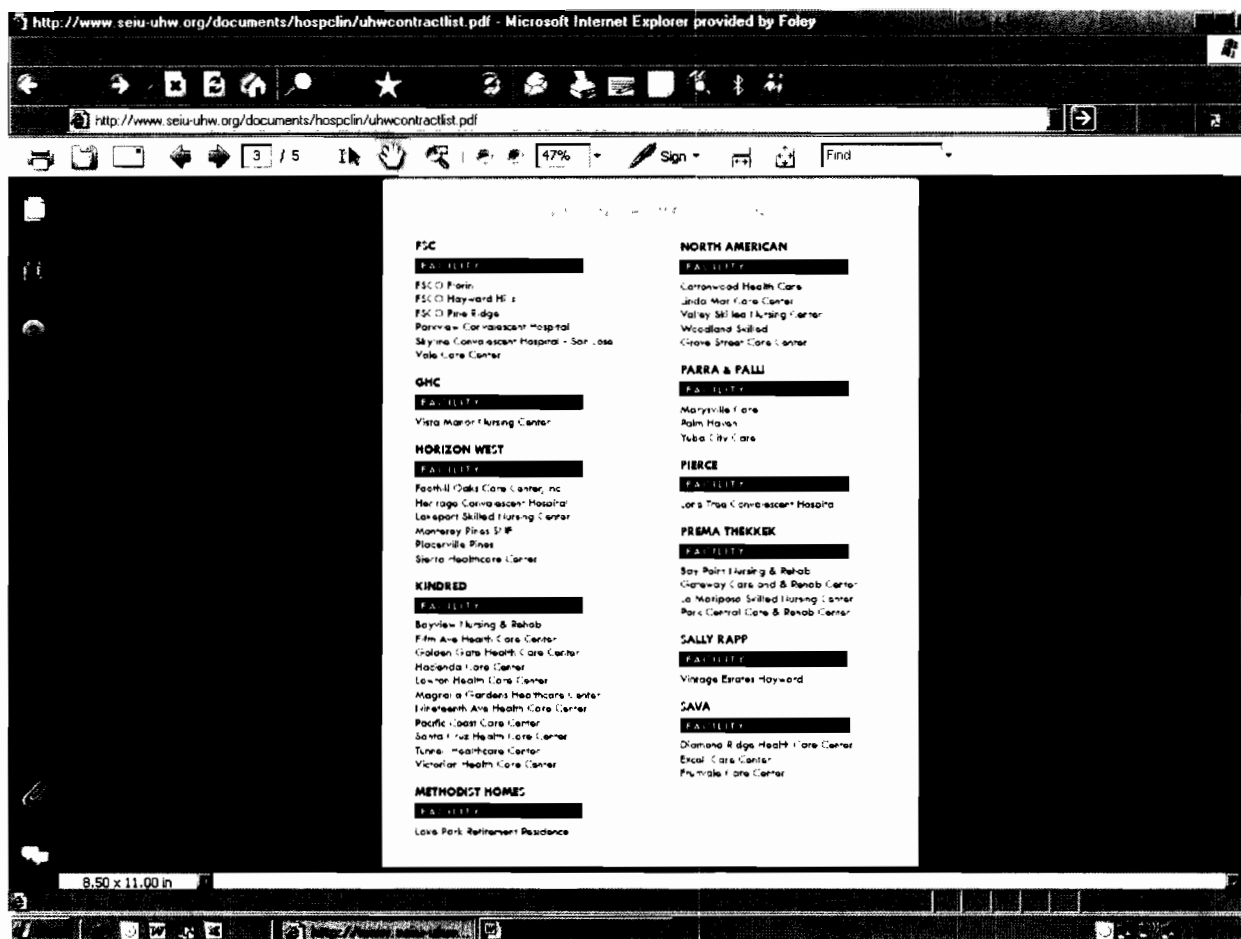
2008 Unity Platform

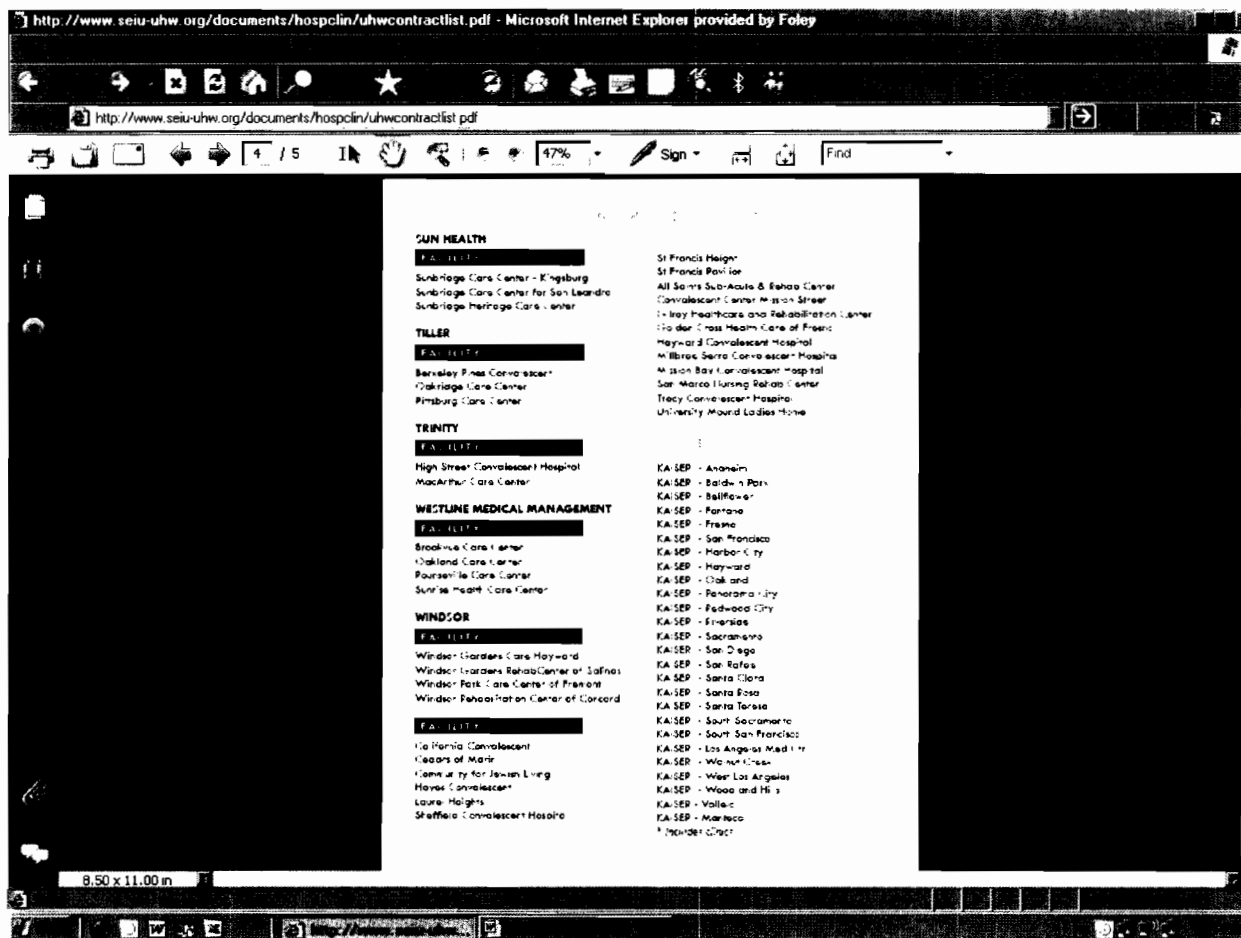
- **One Contract**
 - o One contract for all hospitals under the same employer
- **Quality Care**
 - o Quality care committees
 - o Patient advocate fund
 - o Voice in service expansion and delivery
- **Employment and Income Security**
 - o Ban on subcontracting
 - o Successor bid guarantee
 - o No layoffs
 - o No task elimination
 - o Union registry
- **Union Rights**
 - o Paid time for stewards and organizers

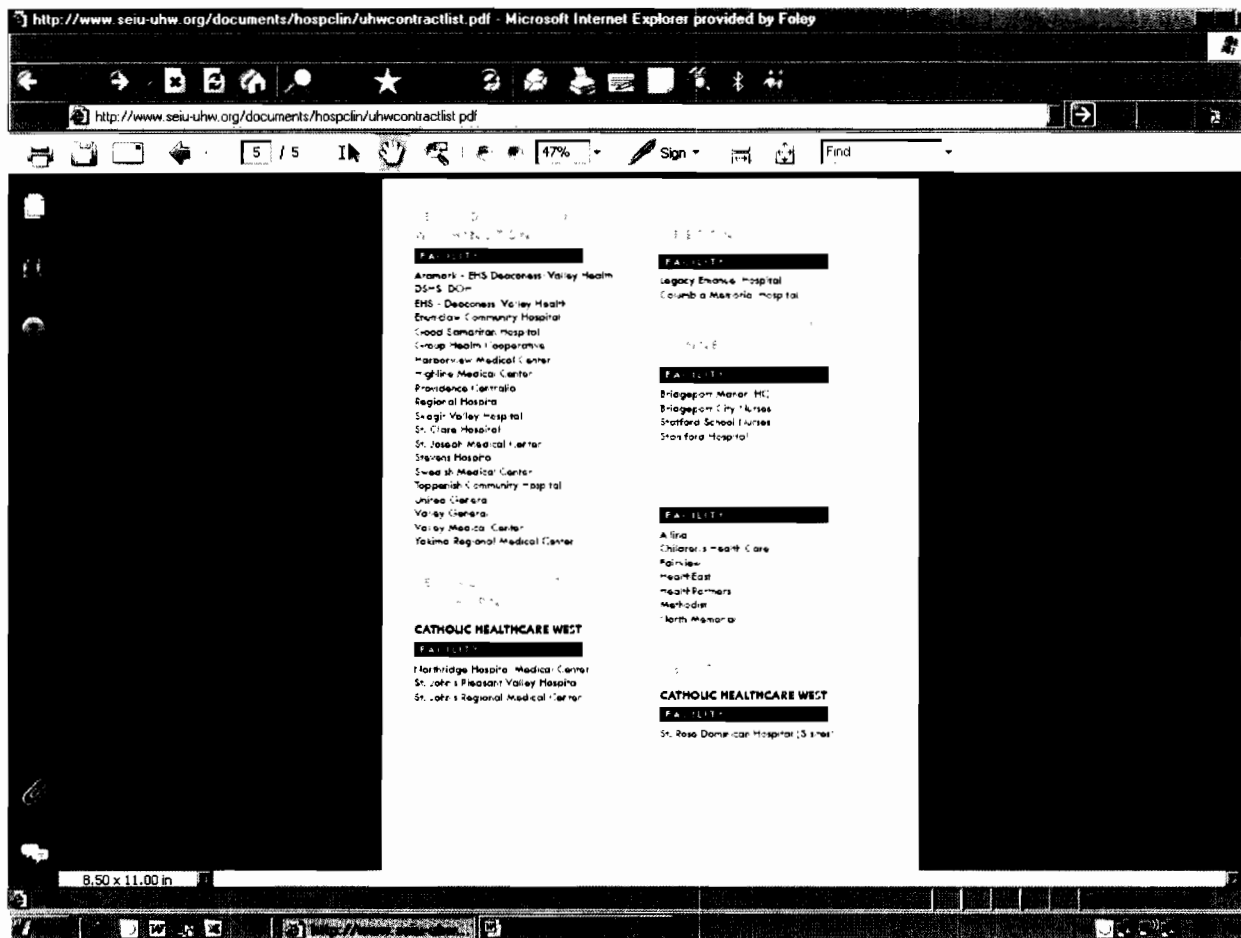












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The News

THE BUSINESS JOURNAL (Silicon Valley/San Jose) [seiu-uhw.org](http://www.seiu-uhw.org) OCTOBER 8, 2007

SEIU targets 2008 contracts with hospitals, nursing homes

BY SARA SOLWITCH
solwits@sjbizjournal.com

SEIU United Healthcare Workers West is gearing up for a slew of bargaining talks in California and other western states, culminating in what union leaders describe as the nation's single largest coordinated campaign in health care.

More than 200 contracts with hospitals and nursing homes across California are due to expire within a three-month period in 2008 and United Healthcare Workers will be negotiating all of them.

"We have worked 10 years to get to this point to get the contracts lined up this way," says John Barco, vice president of the local that represents 150,000 workers, from licensed vocational nurses and pharmacists to certified nursing assistants, homecare workers and clerical staff.

"It allows us to have an industrial approach," he continues. "Instead of bargaining one hospital, one system at a time, it allows us to talk about issues."

The union accomplished this feat in a number of ways. In some cases, it negotiated short-term contracts. In other cases, long-term contracts. In still others, it bid its time and allowed contracts to lapse over periods of months.

Recently, it brought together 2,000 leaders from hospitals and nursing facilities locally across six states for its annual conference in San Jose. Union representatives met in small groups, laying the groundwork for the upcoming negotiations — most of them scheduled for May, June and July — with 100 hospitals and 100 nursing homes.

Though United Healthcare Workers says it is still developing a plan of action, the issues this time around are threefold: wages and benefits, worker training and education, a growing voice in patient care decisions.

Tying together all three, says Barco, is the "fundamental belief that no matter where you do the work, you should get the same pay."

By lining up all these separate contract negotiations, the union has succeeded not only in increasing its own power, according to UHW Local President Sal Roselli, it has also strengthened its ability to involve government and community organizations, as well as attract more media attention.

Roselli says he anticipates positive talks with Kaiser Permanente, United Healthcare Workers is a member of the health giant's Labor Management Partnership and describes the relationship as "open and collaborative."

Not so its relations with either Stanford Hospital & Clinics or Sutter Health Network.

Roselli says that both systems are "resistant to giving caregivers a voice. They have been the ones that are most resistant to training and upgrade programs."

"Stanford," he continues, "is extremely adversarial, extremely anti-union, extremely rich and extremely arrogant. Their attitude is 'We don't need to hear what healthcare providers want. Just do it our way.'"

Stanford did not respond to Roselli's comments in time for this article.

The union's strategy proved itself successful in 2004, when 70 of its contracts expired within a short time. United Healthcare Workers began negotiations by settling a master statewide contract with Catholic Health Care West. From there, it moved to the Daughters of Charity Health System with similar demands. The union called a 12-hour strike before a contract was signed.

Soon, says Roselli, it had settled with every hospital and nursing home in the state, excluding Sutter, with whom it has a notoriously problematic relationship.

A 40-day strike against California Pacific Medical Center transpired before an agreement was struck. The union went on to wage another one-week strike against Sutter's Eden Medical Center in Castro Valley.

Some hospitals have already entered into early talk stages with the union. O'Connor Hospital's contract expires next April, but it is already moving with the union to discuss work redesign, a subject that includes streamlining the patient registration process. "We're using good faith of force to be collaborative in the interest of our employees and our patients," says spokeswoman Elizabeth Nikols, adding that the talks are not intended as active negotiation.

"In the past we've always been able to work with SEIU."

The California Nurses Association has meanwhile announced a two-day strike against 13 Sutter hospitals, including Mills Peninsula Hospital in Burlingame.

That strike, which involves 5,000 nurses and is scheduled for Oct. 12 and 13, has been called the largest nurses' strike in a decade.

SARA SOLWITCH covers health care and labor for the Business Journal. She can reach her at (408) 275-1941.

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7th Avenue Center	Santa Cruz	CA
Addus Healthcare Inc	Stornton	CA
Alameda County Medical Center		CA
Alameda Hospital	Alameda	CA
All Saints Sub-Acute & Rehab Center	San Leandro	CA
Alliance Medical Center	Healdsburg	CA
Almaden Care	San Jose	CA
Alta Bates Medical Center		CA
Amador County IHSS Public Authority	Lodi	CA
Antelope Valley Hospital	Lancaster	CA
Antioch Nursing Convalescent Hospital	Antioch	CA
Bakersfield Memorial Hospital	Bakersfield	CA
Barlow Respiratory Hospital	Los Angeles	CA
Bay Point Nursing & Rehab	Hawarden	CA
Bayview Nursing & Rehab	Alameda	CA
Berkeley Long-term Care	Berkeley	CA
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Brookside Convalescent Hospital	San Mateo	CA
Brookvue Care Center	San Pablo	CA
Brotman Medical Center	Emeryville	CA
Bruceville Terrace	Sacramento	CA
Calaveras County IHSS Public Authority	San Andreas	CA
California Convalescent	San Francisco	CA
California Hospital Medical Center	Los Angeles	CA
California Pacific Medical Center - California Campus	San Francisco	CA
California Pacific Medical Center - Davies Campus	San Francisco	CA
California Pacific Medical Center - Pacific Campus	San Francisco	CA
California Pacific Medical Center - Saint Luke's Campus	San Francisco	CA
Cedars Of Mann	Rose	CA
Cedars-Sinai Medical Center	Los Angeles	CA
Centinelia Freeman - Marina Campus	Marina Del Rey	CA
Centinela Hospital Medical Center	Indlewood	CA
Central Gardens Convalescent Hospital	San Francisco	CA
Chaparral House	Berkeley	CA
Children's Hospital Of Oakland	San Leandro	CA
Chinese Hospital Of San Francisco	San Francisco	CA
CHW Sacramento Regional Office	Rancho Cordova	CA
City and County of San Francisco	San Francisco	CA
City Of Hope National Medical Center	Duarte	CA
Clinton Village Convalescent Hospital	Oakland	CA
Clovis Convalescent Hospital	Clovis	CA
Community For Jewish Living	Emeryville	CA
Community Hospital of Huntington Park	Huntington Park	CA

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Community Hospital of Huntington Park	Huntington Park	CA
Community Hospital Of San Bernardino	San Bernardino	CA
Contra Costa County IHSS Public Authority	Martinez	CA
Convalescent Center Mission Street	San Francisco	CA
Cottonwood Health Care Center	Woodland	CA
Country Drive Care Center	Fremont	CA
Courtyard Care Center	Hayward	CA
Creekside Health Care Center	San Pablo	CA
Crestwood Geriatric Treatment Center	Fremont	CA
Crothall Health Care Inc	Los Angeles	CA
D Goren DDS & Associates	Lakewood	CA
Desert Regional Medical Center	Palm Springs	CA
Diamond Ridge Health Care Center	Pittsburg	CA
Doctors Hospital Of Manteca	Manteca	CA
Doctors Medical Center Modesto	Modesto	CA
Doctors Medical Center San Pablo / Pinole	San Pablo	CA
Dominican Hospital	Santa Cruz	CA
Dominican Oaks Assisted Living	Santa Cruz	CA
Driftwood Healthcare Center	Hayward	CA
Eden Medical Center	Castro Valley	CA
El Camino Hospital	Mountain View	CA
Emerald Gardens Nursing Center	Sacramento	CA
Emmanuel Convalescent Hospital - Alameda	Alameda	CA
Emmanuel Convalescent Hospital - Los Gatos	Los Gatos	CA
Emmanuel Convalescent Hospital - Millbrae	Millbrae	CA
Emmanuel Convalescent Hospital - San Jose	San Jose	CA
Emmanuel Health Care Ctr - Yuba City	Yuba City	CA
Empress Care Center	San Jose	CA
Encino-Tarzana Regional Medical Center, Encino Campus	Encino	CA
Encino-Tarzana Regional Medical Center, Tarzana Campus	Tarzana	CA
Enloe Medical Center	Chico	CA

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Enloe Medical Center	Fresno	CA
Evergreen Castro Valley Care	Castro Valley	CA
Evergreen HC Ctrs of Vallejo - Heartwood	Vallejo	CA
Evergreen HC Ctrs of Vallejo - Louisiana	Vallejo	CA
Evergreen HC Ctrs of Vallejo - Springs Road	Vallejo	CA
Evergreen Health and Rehab Ctr of Petaluma	Petaluma	CA
Evergreen New Hope Health & Rehab	Tracy	CA
Excell Care Ctr	Oakland	CA
Fields Dental Group	Van Nuys	CA
Fifth Ave Health Care Center	San Rafael	CA
Florin Healthcare	Sacramento	CA
Foothill Oaks Care Center	Ruburn	CA
Frank Campbell DDS Inc	Pasadena	CA
Fremont Health Ctr	Fremont	CA
French Hospital Medical Center	San Luis Obispo	CA
Fresno Care & Guidance Center	Fresno	CA
Fresno County IHSS Public Authority	Fresno	CA
Fruitvale Care Ctr	Oakland	CA
Garden Grove Hospital and Medical Center	Garden Grove	CA
Garfield Medical Center	Monterey Park	CA
Gateway Care & Rehab Center	Hayward	CA
Gateways Hospital & Mental Health Center	Los Angeles	CA
Gilroy Healthcare and Rehabilitation Center	Gilroy	CA
Gladman Mental Health Rehab Center	Oakland	CA
Golden Cross Health Care Of Fresno	Fresno	CA
Golden Gate Health Care Center	San Francisco	CA
Good Samaritan Hospital/Los Angeles	Los Angeles	CA
Good Samaritan Hospital/Mission Oaks	San Jose	CA
Grand Lake Gardens	Oakland	CA
Grant Questa Nursing & Rehab Center	Mountain View	CA
Greater El Monte Community Hospital	South El Monte	CA
Greenfield Care Center Of Fairfield	Fairfield	CA
Grove Street Care Center	San Francisco	CA

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Greenfield Care Center Of Fairfield	Fairfield	CA
Grove Street Care Center	San Francisco	CA
Hacienda Care Center	Livermore	CA
Haves Convalescent Hospital	San Francisco	CA
Hayward Convalescent Hospital	Hayward	CA
Hayward Hills Healthcare Center	Hayward	CA
Hazel Hawkins Memorial Hospital	Holister	CA
Hemet Valley Medical Center	Hemet	CA
Heritage Convalescent Hospital	Sacramento	CA
High Street Convalescent Hospital	Oakland	CA
Hillside Care Center	San Rafael	CA
Hollywood Community Hospital	Hollywood	CA
Hollywood Presbyterian Medical Center	Los Angeles	CA
Horizon Health & Sub-Acute Center	Fresno	CA
Insomnia Coffee Co	Roseville	CA
Institute On Aging	San Francisco	CA
Irvine Regional Hospital and Medical Center	Irvine	CA
Jewish Home of San Francisco	San Francisco	CA
John F Kennedy Memorial Hospital	Indio	CA
John Muir Medical Center - Concord	Concord	CA
Kaiser Alameda Medical Office Bldg	Alameda	CA
Kaiser Antioch	Antioch	CA
Kaiser Arden		
Kaiser Baldwin Park Medical Center and MCB Outlying Clinics	Baldwin Park	CA
Kaiser Bayhill Medical Offices	San Bruno	CA
Kaiser Belflower Medical Center and MOB Outlying Clinics		
Kaiser Berkeley	Berkeley	CA
Kaiser Berkeley Lab	Berkeley	CA
Kaiser Campbell	Campbell	CA
Kaiser Daly City Medical Offices	Daly City	CA
Kaiser Emeryville	Emeryville	CA

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Kaiser Campus	Campus	CA
Kaiser Daly City Medical Offices	Daly City	CA
Kaiser Davis	Davis	CA
Kaiser Fair Oaks		
Kaiser Fairfield	Fairfield	CA
Kaiser Folsom	Folsom	
Kaiser Fremont Medical Center & Offices	Fremont	CA
Kaiser French Campus	San Francisco	CA
Kaiser Fresno	Fresno	CA
Kaiser Gilroy Medical Offices	Gilroy	CA
Kaiser Hayward	Hayward	CA
Kaiser Lancaster Medical Offices		
Kaiser Livermore Distribution Center		
Kaiser Livermore Medical Offices	Livermore	CA
Kaiser Manteca	Manteca	
Kaiser Martinez	Martinez	CA
Kaiser Milpitas	Milpitas	CA
Kaiser Modesto		
Kaiser Mountain View	Mountain View	CA
Kaiser Napa	Napa	CA
Kaiser Novato Medical Offices	Novato	CA
Kaiser Oakland	Oakland	CA
Kaiser Orange County Facilities		
Kaiser Palmdale Medical Offices	Palmdale	CA
Kaiser Panorama City and MOB Outlying Clinics		
Kaiser Petaluma Medical Offices	Petaluma	CA
Kaiser Pleasanton Medical Offices	Pleasanton	CA
Kaiser Point West		
Kaiser Post Acute Care Center	San Leandro	CA
Kaiser Rancho Cordova	Rancho Cordova	CA
Kaiser Redwood City Medical Center & Medical Offices	Redwood City	CA
Kaiser Regional Operations		

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Kaiser Regional Operations		
Kaiser Richmond	Richmond	CA
Kaiser Roseville		
Kaiser Sacramento	Sacramento	CA
Kaiser Sacramento Call Center	Sacramento	CA
Kaiser San Bruno Medical Offices	San Bruno	CA
Kaiser San Francisco Medical Center & Medical Offices	San Francisco	CA
Kaiser San Jose Call Center	San Jose	CA
Kaiser San Rafael Medical Center & Medical Offices	San Rafael	CA
Kaiser Santa Clara	Santa Clara	CA
Kaiser Santa Clara Medical Offices	Santa Clara	CA
Kaiser Santa Rosa	Santa Rosa	CA
Kaiser Santa Teresa Medical Center	San Jose	CA
Kaiser South Bay Medical Center and MOB Outlying Clinics		
Kaiser South Sacramento	Sacramento	CA
Kaiser South San Francisco Medical Center & Medical Offices	South San Francisco	CA
Kaiser Stockton	Stockton	CA
Kaiser Stockton Call Center		
Kaiser Sunset (Los Angeles Medical Center) and MOB Outlying Clinics	Los Angeles	CA
Kaiser Tracy Medical Offices	Tracy	CA
Kaiser Union City	Union City	CA
Kaiser Vacaville	Vacaville	CA
Kaiser Vallejo Call Center	Vallejo	CA
Kaiser Vallejo Medical Center & Medical Offices	Vallejo	CA
Kaiser Walnut Creek	Walnut Creek	CA
Kaiser West Los Angeles Medical Center and MOB Outlying Clinics	Los Angeles	CA
Kaiser Woodland Hills Medical Center	Woodland Hills	CA

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Kaiser Woodland Hills Medical Center	Woodland Hills	CA
Katherine Healthcare Center	Salinas	CA
Kindred Hospital San Leandro	San Leandro	CA
Kyakameena Skilled Nursing Facility	Berkeley	CA
La Mariposa Care & Rehab Center	Fairfield	CA
Laguna Honda Hospital		
Lake Park Retirement Residence	Oakland	CA
Lakeshore Convalescent Hospital	Oakland	CA
Lakewood Regional Medical Center	Lakewood	CA
Laurel Heights Convalescent Hospital	San Francisco	CA
Lawton Health Care Center	San Francisco	CA
Linda Mai Care Center	Pacific	CA
Lone Tree Convalescent Hospital	Antioch	CA
Los Alamitos Medical Center	Los Alamitos	CA
Los Angeles Gay & Lesbian Community Service Center	Los Angeles	CA
Los Robles Regional Medical Center	Thousand Oaks	CA
Mac Arthur Nursing Center	Oakland	CA
Madera County		
Magnolia Gardens Healthcare Center	Bunigame	CA
Majestic Pines Care Center	Hayward	CA
Manan Medical Center	Santa Maria	CA
Marin County IHSS Public Authority	San Rafael	CA
Mariposa County		
Mark Twain Convalescent Hospital	San Andreas	CA
Mark Twain Saint Joseph's Hospital	San Andreas	CA
Marysville Care & Rehabilitation	Marysville	CA
Matilda Brown Home	Oakland	CA
McClure Convalescent Hospital	Oakland	CA
Menifee Valley Medical Center	San Luis	CA
Mercy General Hospital	Sacramento	CA
Mercy Hospital Of Folsom	Folsom	CA
Merry Hospitals of Bakersfield	Bakersfield	CA

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Mercy Hospital Of Folsom	Folsom	CA
Mercy Hospitals of Bakersfield	Bakersfield	CA
Mercy Medical Center Of Redding	Redding	CA
Mercy Medical Center Of Mt Shasta	Mount Shasta	CA
Mercy San Juan Medical Center	Cambridge	CA
Mercy Southwest Hospital	Bakersfield	CA
Methodist Hospital of Sacramento	Sacramento	CA
Millbrae Serra Convalescent Hospital	Millbrae	CA
Mission Bay Convalescent Hospital	San Francisco	CA
Mission Hospital of Huntington Park	Huntington Park	CA
Mission Neighborhood Health Clinic	San Francisco	CA
Monterey Care Center	Monterey	CA
Monterey Park Hospital	Monterey Park	CA
Monterey Pines Skilled Nursing Facility	Monterey	CA
Moreno Valley Community Hospital	Moreno Valley	CA
Motion Picture & Television Fund	Woodland Hills	CA
Mt Diablo Medical Center	Chico	CA
Nineteenth Ave Healthcare Center	San Francisco	CA
Northeast Valley Health Corp	San Fernando	CA
Northgate Care Center	San Rafael	CA
Northridge Hospital Medical Center	Northridge	CA
O'Connor Hospital	San Jose	CA
Oakland Care Center	Oakland	CA
Oakridge Care Center	Oakland	CA
Olympia Medical Center	Los Angeles	CA
Pacific Coast Care Center	Salinas	CA
Pacific Grove Convalescent Hospital	Pacific Grove	CA
Pacifica Hospital Of The Valley	San Valley	CA
Palm Haven Care Center	Manteca	CA
Palo Alto Nursing Center	Palo Alto	CA
Park Central Care & Rehab Center	Fremont	CA
Parkmont Care Center	Fremont	CA

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Parkmont Care Center	Fremont	CA
Parkview Convalescent Hospital	Hayward	CA
Piedmont Gardens	Oakland	CA
Pittsburg Care Center	Pittsburg	CA
Placerville Pines	Placerville	CA
Pleasant Care Convalescent Petaluma	Petaluma	CA
Pleasant Care Rehab & Nursing Center Santa Cruz	Santa Cruz	CA
Prison Health Services	Alameda	CA
Providence Saint Joseph Medical Center	Burbank	CA
Rady Children's Hospital & Health Center	San Diego	CA
Redwoods	Mill Valley	CA
Regional Medical Center Of San Jose	San Jose	CA
Ridge Rehab, The	Salt Lake	CA
Riverside Community Hospital	Riverside	CA
Roger P Fieldman, Dds Inc & Assoc	Los Angeles	CA
Rounseville Care Center	Oakland	CA
Royal Oaks Convalescent Hospital	Glenn	CA
Sacramento County IHSS Public Authority	Sacramento	CA
Saint Bernardine Medical Center	San Bernardino	CA
Saint Christopher Convalescent Hospital	Hayward	CA
Saint Elizabeth Community Hospital		
Saint Francis Convalescent Pavilion	Day City	CA
Saint Francis Heights Convalescent Hospital	Day City	CA
Saint Francis Medical Center	Lynwood	CA
Saint Francis Memorial Hospital	San Francisco	CA
Saint John's Pleasant Valley Hospital	Lamarillo	CA
Saint John's Regional Medical Center	Orland	CA
Saint Joseph's Behavioral Health Center	Stockton	CA
Saint Joseph's Medical Center - Stockton	Stockton	CA
Saint Louise Regional Hospital	Merby	CA
Saint Mary Medical Center	Long Beach	CA

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Saint Louise Regional Hospital	Garland	CA
Saint Mary Medical Center	Long Beach	CA
Saint Mary's Hospital & Medical Center	San Francisco	CA
Saint Paul's Towers	Oakland	CA
Salinas Rehab & Care Center	Salinas	CA
Salinas Valley Memorial Hospital	Salinas	CA
San Francisco Community Conv	San Francisco	CA
San Francisco Consortium	San Francisco	CA
San Francisco General Hospital		
San Francisco IHSS Public Authority	San Francisco	CA
San Joaquin County IHSS Public Authority	Stockton	CA
San Jose Medical Center	San Jose	CA
San Jose Medical Group	San Jose	CA
San Leandro Healthcare Center	San Leandro	CA
San Marco Nursing & Rehab Ctr	Walnut Creek	CA
San Miguel Villa	Concord	CA
San Ramon Regional Medical Center	San Ramon	CA
Santa Cruz Healthcare Center	Santa Cruz	CA
Savior Lane Healthcare Center	Sacramento	CA
Sequoia Hospital	Redwood City	CA
Sequoias, The	San Francisco	CA
Serra Community Medical Clinic, Inc	Sun Valley	CA
Seton Medical Center	Daly City	CA
Seton Medical Center - Coastside	Moss Beach	CA
Sharon Heights Care & Rehab	Menlo Park	CA
Shasta Regional Medical Center	Redding	CA
Sheffield Convalescent	San Francisco	CA
Sherwood Healthcare	Sacramento	CA
Shields Nursing Center - El Cerrito	El Cerrito	CA
Shields Nursing Center - Richmond	Richmond	CA
Siena Vista Regional Medical Center	San Luis Obispo	CA
Skyline Care Center	Salinas	CA
Skyline Convalescent Hospital - San Jose	San Jose	CA

Facility Search - Microsoft Internet Explorer provided by Foley

http://www.seiu-uhw.org/aboutuhw/facilities/

Skyline Care Center	Solinas	CA
Skyline Convalescent Hospital - San Jose	San Jose	CA
Sonoma County HSS Public Authority	Santa Rosa	CA
Sonoma Healthcare Center	Sonoma	CA
Southwest Community Health Center	Santa Rosa	CA
Stanford University Medical Center		
Summit Medical Center		
Sunbridge Care Center For San Leandro	San Leandro	CA
Sunbridge Heritage Care Center	Stouton	CA
Sunnyside Convalescent Hospital	Fresno	CA
Sunnyside Healthcare Center	Roseville	CA
Sutter Amador Hospital		
Sutter Coast Hospital	Chesnut City	CA
Sutter County		
Sutter Delta Medical Center	Anticon	CA
Sutter Lakeside Hospital	Lakeport	CA
Sutter Medical Center of Santa Rosa	Santa Rosa	CA
Sutter Roseville Medical Center	Roseville	CA
Sutter Solano Medical Center	Vallejo	CA
Tiburcio Vasquez Health Center	Union City	CA
Tracy Convalescent Hospital	Tracy	CA
Tunnell Healthcare Center	San Francisco	CA
Tuolumne County		
Tuolumne County Health Care Employees	Tuolumne	CA
Twin Cities Community Hospital	Templeton	CA
University Mound Ladies Home	San Francisco	CA
University Of Southern California University Hospital	Los Angeles	CA
Vale Care Center	San Pablo	CA
Valley Care & Guidance Center	Fresno	CA
Valley Manor Rehab Center	Concord	CA
Valley Pointe Rehab / Sub-Acute	Castro Valley	CA
Valley Skilled Nursing Center	Sacramento	CA

Facility Search - Microsoft Internet Explorer provided by Foley

http://www.seiu-uhw.org/aboutuhw/facilities/

Valley Skilled Nursing Center	San Ramon	CA
Victorian Healthcare Center	San Francisco	CA
Villa Fairmont Mental Health Center	San Leandro	CA
Villa Residential Care	Tracy City	CA
Vintage Estates Of Hayward	Hayward	CA
Visiting Nurses Association Of Santa Cruz County	Santa Cruz	CA
Vista Manor Nursing Center	San Jose	CA
Washington Hospital	Fremont	CA
Watsonville Community Hospital	Watsonville	CA
Watts Healthcare Corporation	Los Angeles	CA
West Hills Hospital & Medical Center	West Hills	CA
West Oakland Health Council	Oakland	CA
Western Dental		
Western Medical Center - Anaheim	Anaheim	CA
Willow Pass Healthcare Center	Concord	CA
Willow Tree Convalescent Hospital	Oakland	CA
Windsor Gardens Care Center of Hayward	Hayward	CA
Windsor Gardens Rehabilitation Center of Salinas	Salinas	CA
Windsor Manor Rehabilitation Center of Concord	Concord	CA
Windsor Park Care Center of Fremont	Fremont	CA
Woodland Healthcare Clinic	Woodland	CA
Woodland Hospital	Woodland	CA
Woodland Skilled Nursing Center	Woodland	CA
Woodside Nursing & Rehab	San Luis Obispo	CA
Yolo County IHSS Public Authority	Woodland	CA
Yuba City Care & Rehabilitation	Yuba City	CA
Yuba County IHSS Public Authority	Marysville	CA

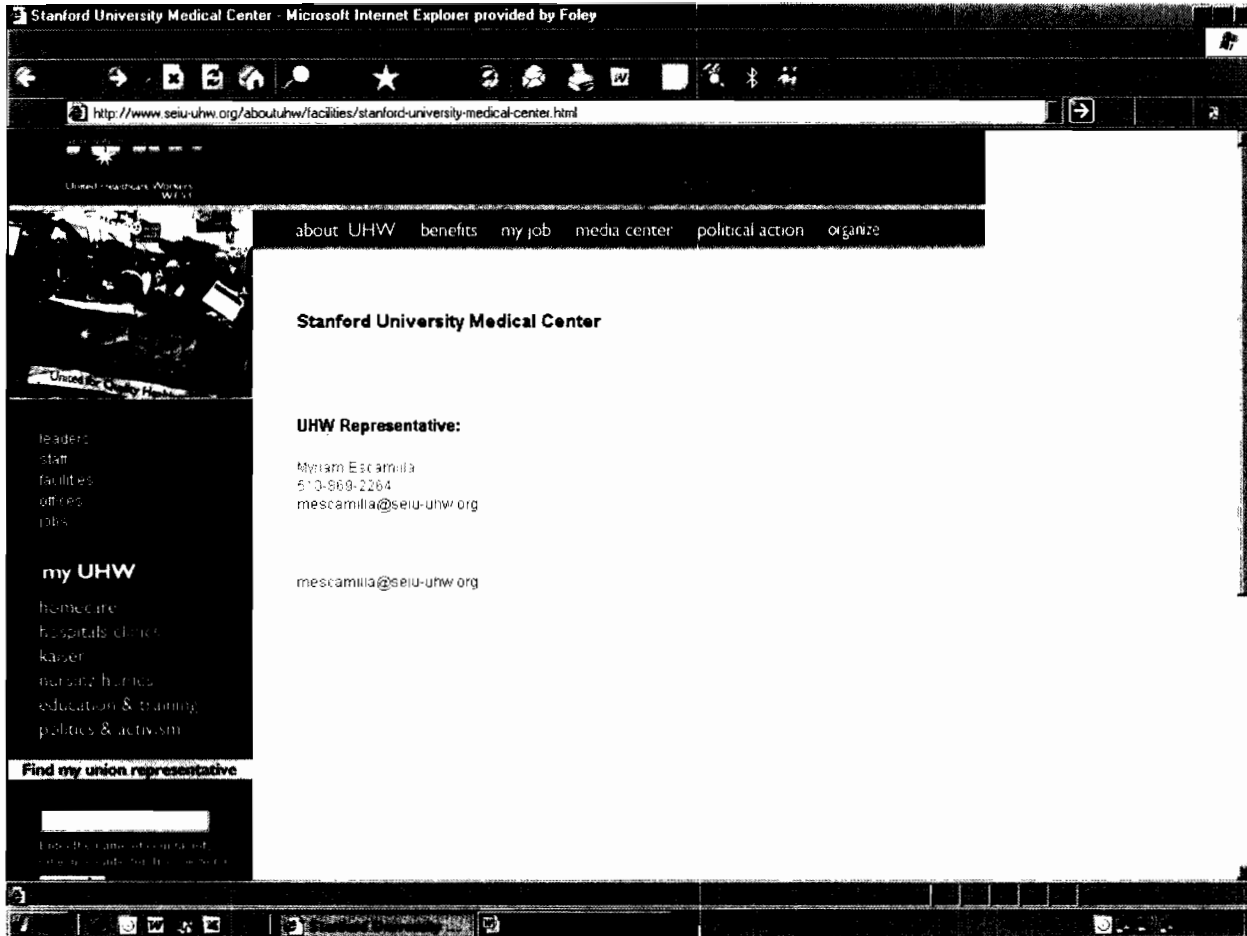
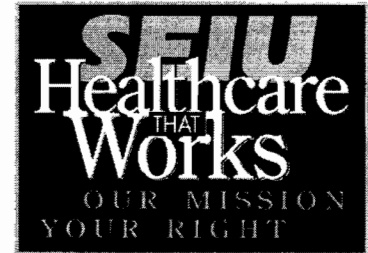


EXHIBIT D

2008 CONTRACT EXPIRATIONS



SEIU UHW-WEST HOSPITAL DIVISION

CATHOLIC HEALTHCARE WEST

FACILITY

Bakersfield Memorial Hospital
Bruceville Terrace
California Hospital Medical Center
Community Hospital Of San Bernardino
Dominican Hospital
Dominican Oaks Assisted Living
French Hospital Medical Center
Mark Twain Hospital
Marian Medical Center
Mercy General Hospital
Mercy Home Health Hospice & Lifeline
Mercy Hospital Of Folsom
Mercy Hospitals Of Bakersfield
Mercy Medical Center Of Redding
Mercy Medical Center Of Mt Shasta
Mercy San Juan Medical Center
Mercy Southwest
Methodist Hospital Of Sacramento
Northridge Hospital Medical Center
Saint Francis Memorial Hospital
Sequoia Hospital
St. Bernardine Medical Center
St. Elizabeth Community Hospital
St. John's Pleasant Valley Hospital
St. John's Regional Medical Center
St. Joseph's Behavioral Health Center
St. Joseph's Medical Center
St. Mary's Medical Center-Long Beach
St. Mary's Medical Ctr- San Francisco
Woodland Healthcare Clinic
Woodland Hospital

COMMUNITY HEALTH SYSTEMS (CHS)

FACILITY

Watsonville Community Hospital

DAUGHTERS OF CHARITY

FACILITY

O'Connor Hospital
Saint Louise Regional Hospital
Seton Medical Center
Seton Medical Center-Coastside
Saint Francis

INDEPENDENTS AND CLINICS

FACILITY

Alameda Hospital
Antelope Valley Hospital
Chinese Hospital of San Francisco
City Of Hope National Medical Center
Compass/Crothall Services Group
Compass/Morrison Mgmt Specialists
Doctors Medical Center San Pablo/Pinole
Gateways Hospital & Mental Health Ctr.
Hollywood Community Hospital
Information & Referral Fed Of LA
Los Angeles Gay & Lesbian Comm. Ctr.
Mission Neighborhood Health Clinic
Southwest Community Health Center
Stanford Univ. Med. Ctr./ Lucille Packard
Tiburcio Vasquez Health Center
Washington Hospital

HOSPITAL DIVISION

SUTTER HEALTH

FACILITY

Alta Bates Summit Medical Center (3 sites)
California Pacific Medical Center (3 sites)
Eden Medical Center
St Luke's Hospital
Sutter Amador
Sutter Delta Medical Center
Sutter Lakeside Hospital
Sutter Medical Center Of Santa Rosa
Sutter Roseville Medical Center
Sutter Solano Medical Center

NURSING HOME DIVISION

AVALON HEALTHCARE

FACILITY

Avalon Care Center Sonora
Avalon Healthcare of Chowchilla
Mark Twain Convalescent

BEVERLY

FACILITY

Beverly Healthcare Center
Beverly Living Care
Beverly Manor Fresno
Clovis Convalescent
Fresno Care & Guidance Center

COUNTY VILLA HEALTH SERVICES

FACILITY

Country Villa of San Rafael

COVENANT

FACILITY

Emerald Gardens Nursing Center
Grant Cuesta Nursing & Rehab Center
Palo Alto Nursing Center
Willow Tree Convalescent Hospital

EVA CARE GROUP

FACILITY

Empress Care Center
Greenfiled Care Center of Fairfield
Evergreen Castro Valley Care
Evergreen HC Centers of Vallejo - Heartwood
Evergreen HC Centers of Vallejo - Springs Rd
Evergreen Health & Rehab Center of Petaluma
Evergreen New Hope Health & Rehab
Katherine Healthcare Center

FORESIGHT MANAGEMENT SERVICES

FACILITY

Brookside Convalescent Hospital
McClure Convalescent Hospital
Northgate Care Center
Valley Pointe Rehab/Sub-Acute

FSC

FACILITY

Almaden Care
Creekside Health Care Center
Fremont Health Center
FSCO Driftwood Hayward

NURSING HOME DIVISION

FSC

FACILITY

FSCO Florin
FSCO Hayward Hills
FSCO Pine Ridge
Parkview Convalescent Hospital
Skyline Convalescent Hospital - San Jose
Vale Care Center

GHC

FACILITY

Vista Manor Nursing Center

HORIZON WEST

FACILITY

Foothill Oaks Care Center, Inc
Heritage Convalescent Hospital
Lakeport Skilled Nursing Center
Monterey Pines SNF
Placerville Pines
Sierra Healthcare Center

KINDRED

FACILITY

Bayview Nursing & Rehab
Fifth Ave Health Care Center
Golden Gate Health Care Center
Hacienda Care Center
Lawton Health Care Center
Magnolia Gardens Healthcare Center
Nineteenth Ave Health Care Center
Pacific Coast Care Center
Santa Cruz Health Care Center
Tunnell Healthcare Center
Victorian Health Care Center

METHODIST HOMES

FACILITY

Lake Park Retirement Residence

NORTH AMERICAN

FACILITY

Cottonwood Health Care
Linda Mar Care Center
Valley Skilled Nursing Center
Woodland Skilled
Grove Street Care Center

PARRA & PALLI

FACILITY

Marysville Care
Palm Haven
Yuba City Care

PIERCE

FACILITY

Lone Tree Convalescent Hospital

PREMA THEKKEK

FACILITY

Bay Point Nursing & Rehab
Gateway Care and & Rehab Center
La Mariposa Skilled Nursing Center
Park Central Care & Rehab Center

SALLY RAPP

FACILITY

Vintage Estates Hayward

SAVA

FACILITY

Diamond Ridge Health Care Center
Excell Care Center
Fruitvale Care Center

NURSING HOME DIVISION

SUN HEALTH

FACILITY

Sunbridge Care Center - Kingsburg
Sunbridge Care Center for San Leandro
Sunbridge Heritage Care Center

TILLER

FACILITY

Berkeley Pines Convalescent
Oakridge Care Center
Pittsburg Care Center

TRINITY

FACILITY

High Street Convalescent Hospital
MacArthur Care Center

WESTLINE MEDICAL MANAGEMENT

FACILITY

Brookvue Care Center
Oakland Care Center
Rounseville Care Center
Sunrise Health Care Center

WINDSOR

FACILITY

Windsor Gardens Care Hayward
Windsor Gardens RehabCenter of Salinas
Windsor Park Care Center of Fremont
Windsor Rehabilitation Center of Concord

FACILITY

California Convalescent
Cedars of Marin
Community for Jewish Living
Hayes Convalescent
Laurel Heights
Sheffield Convalescent Hospital

St Francis Height
St Francis Pavilion
All Saints Sub-Acute & Rehab Center
Convalescent Center Mission Street
Gilroy Healthcare and Rehabilitation Center
Golden Cross Health Care of Fresno
Hayward Convalescent Hospital
Millbrae Serra Convalescent Hospital
Mission Bay Convalescent Hospital
San Marco Nursing Rehab Center
Tracy Convalescent Hospital
University Mound Ladies Home

KAISER DIVISION*

KAISER - Anaheim
KAISER - Baldwin Park
KAISER - Bellflower
KAISER - Fontana
KAISER - Fresno
KAISER - San Francisco
KAISER - Harbor City
KAISER - Hayward
KAISER - Oakland
KAISER - Panorama City
KAISER - Redwood City
KAISER - Riverside
KAISER - Sacramento
KAISER - San Diego
KAISER - San Rafael
KAISER - Santa Clara
KAISER - Santa Rosa
KAISER - Santa Teresa
KAISER - South Sacramento
KAISER - South San Francisco
KAISER - Los Angeles Med Ctr.
KAISER - Walnut Creek
KAISER - West Los Angeles
KAISER - Woodland Hills
KAISER - Vallejo
KAISER - Manteca

* Includes clinics

**SEIU LOCAL 1199NW
WASHINGTON**

FACILITY

Aramark - EHS Deaconess/Valley Health
DSHS/DOH
EHS - Deaconess/Valley Health
Enumclaw Community Hospital
Good Samaritan Hospital
Group Health Cooperative
Harborview Medical Center
Highline Medical Center
Providence Centralia
Regional Hospital
Skagit Valley Hospital
St. Clare Hospital
St. Joseph Medical Center
Stevens Hospital
Swedish Medical Center
Toppenish Community Hospital
United General
Valley General
Valley Medical Center
Yakima Regional Medical Center

**SEIU LOCAL 121RN
CALIFORNIA**

CATHOLIC HEALTHCARE WEST

FACILITY

Northridge Hospital Medical Center
St. John's Pleasant Valley Hospital
St. John's Regional Medical Center

**SEIU LOCAL 49
OREGON**

FACILITY

Legacy Emanuel Hospital
Columbia Memorial Hospital

**SEIU LOCAL 1199NE
CONNECTICUT**

FACILITY

Bridgeport Manor/HC
Bridgeport City Nurses
Statford School Nurses
Stamford Hospital

**SEIU LOCAL 113
MINNESOTA**

FACILITY

Allina
Children's Health Care
Fairview
HealthEast
HealthPartners
Methodist
North Memorial

**SEIU LOCAL 1107
NEVEDA**

CATHOLIC HEALTHCARE WEST

FACILITY

St. Rose Dominican Hospital (3 sites)

EXHIBIT E

SEIU targets 2008 contracts with hospitals, nursing homes

BY SARA SOLOVITCH
ssolovitch@bizjournals.com

SEIU United Healthcare Workers-West is gearing up for a slew of bargaining talks in California and other western states, culminating in what union leaders describe as the nation's single largest coordinated campaign in health care.

More than 200 contracts with hospitals and nursing homes across California are due to expire within a three-month period in 2008 and United Healthcare Workers will be negotiating all of them.

"We have worked 10 years to get to this point, to get the contracts lined up this way," says John Boros, vice president of the local that represents 150,000 workers, from licensed vocational nurses and pharmacists to certified nursing assistants, homecare workers and clerical staff.

"It allows us to have an industrial approach," he continues. "Instead of bargaining one hospital, one system at a time, it allows us to talk about issues."

The union accomplished this feat in a number of ways. In some cases, it negotiated short-term contracts. In other cases, long-term contracts. In still others, it bided its time and allowed contracts to lapse over periods of months.

Recently, it brought together 2,000 leaders from hospitals and nursing facilities locals across six states for its annual conference in San Jose. Union representatives met in small groups, laying the groundwork for the upcoming negotiations — most of them scheduled for May, June and July — with 100 hospitals and 100 nursing homes.

Though United Healthcare Workers says it is still developing a plan of action, the issues this time around are

threefold: wages and benefits; worker training and education; a growing voice in patient care decisions.

Tying together all three, says Boros, is the "fundamental belief that no matter where you do the work, you should get the same pay."

By lining up all these separate contract negotiations, the union has succeeded not only in increasing its own power, according to UHW Local President Sal Rosselli; it has also strengthened its ability to involve government and community organizations, as well as attract more media attention.

Rosselli says he anticipates positive talks with Kaiser Permanente. United Healthcare Workers is a member of the health giant's Labor Management Partnership and describes the relationship as "open and collaborative."

Not so its relations with either Stanford Hospital & Clinics or Sutter Health Network.

Rosselli says that both systems are "resistant to giving caregivers a voice. They have been the ones that are most resistant to training and upgrade programs."

"Stanford," he continues, "is extremely adversarial, extremely anti-union, extremely rich and extremely arrogant. Their attitude is 'We don't need to hear what healthcare providers want. Just do it our way.'"

Stanford did not respond to Rosselli's comments in time for this article.

The union's strategy proved itself successful in 2004, when 70 of its contracts expired within a short time.

United Healthcare Workers began negotiations by settling a master statewide contract with Catholic Health-

care West. From there, it moved to the Daughters of Charity Health System with similar demands. The union called a 12-hour strike before a contract was signed.

Soon, says Rosselli, it had settled with every hospital and nursing home in the state excluding Sutter, with whom it has a notoriously problematic relationship.

A 60-day strike against California Pacific Medical Center transpired before an agreement was struck. The union went on to wage another one-week strike against Sutter's Eden Medical Center in Castro Valley.

Some hospitals have already entered into early talk stages with the union. O'Connor Hospital's contract expires next April, but it is already meeting with the union to discuss work redesign, a subject that includes streamlining the patient registration process. "We're using good faith efforts to be collaborative in the interest of our employees and our patients," says spokesperson Elizabeth Nikels, adding that the talks are not intended as active negotiation.

"In the past we've always been able to work with SEIU."

The California Nurses Association has meanwhile announced a two-day strike against 13 Sutter hospitals, including Mills-Peninsula Hospital in Burlingame.

That strike, which involves 5,000 nurses and is scheduled for Oct. 10 and 11, has been called the largest nurses' strike in a decade.

SARA SOLOVITCH covers health care and biotech for the Business Journal. You can reach her at (408) 299-1841.

EXHIBIT F



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http://www.seiu521.org/Executive_Board_Budget_Actions.aspx

SEIU Local 521
United for Quality Jobs and Quality Public Services

GO

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Careers

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Executive Board Budget & Actions

2008 Meeting Calendar

The following Executive Board meetings will all be via video conference at San Jose, Bakersfield and Fresno and will start at 6:00 PM:

- Thursday, February 26, 2008
- Thursday, March 27, 2008
- Thursday, April 24, 2008
- Thursday, May 22, 2008
- Thursday, June 19, 2008
- Thursday, July 10, 2008
- Thursday, August 14, 2008
- Thursday, September 11, 2008
- Thursday, October 23, 2008

Please RSVP to Kelly West: (408) 678-3000 x3247

SEIU Local 521 2008-2009

ORGANIZE!

APALA Organizing Training
May 2-4, 2008 in LA

Executive Board Budget & Actions - Microsoft Internet Explorer provided by Foley

http://www.seiu521.org/Executive_Board_Budget_Actions.aspx

Please RSVP to Kelly West: (408) 678-3300 x3347

Convention Elections Committee:

Elections from Saturday, March 8 through March 18 in various locations.
 All members of SEIU Local 521 who have been members of Local 521 and one of our Local 521 agencies since 1/1/07, 1/1/05, 1/1/00, but a total of four years, are eligible for nomination and election to be a delegate to the 46th Annual SEIU International Convention, held July 13-14, 2008. **Nominations have been received and now, it's time to elect your delegates!**

[Click here for dates, times and locations.](#)

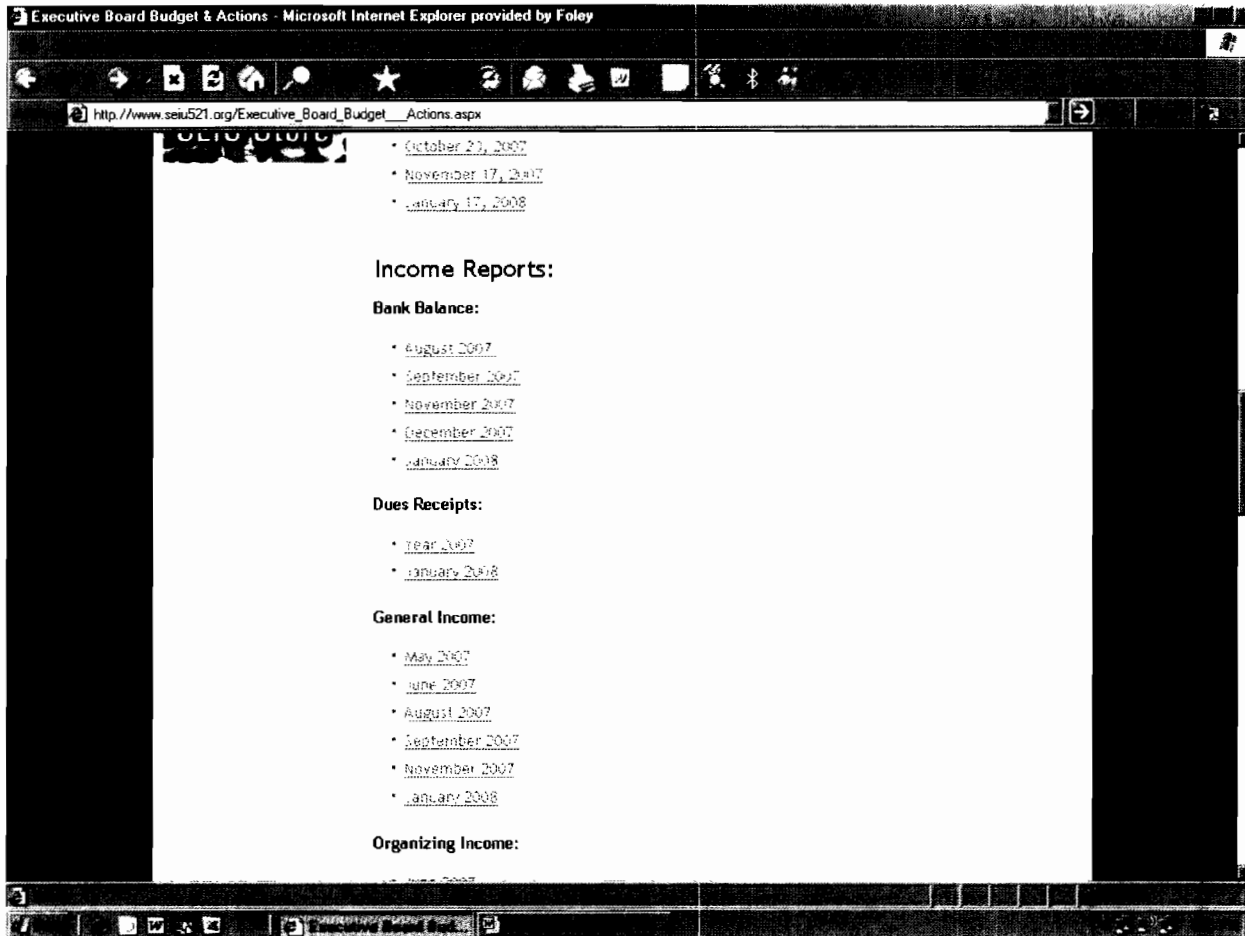
Local 521 Budget:

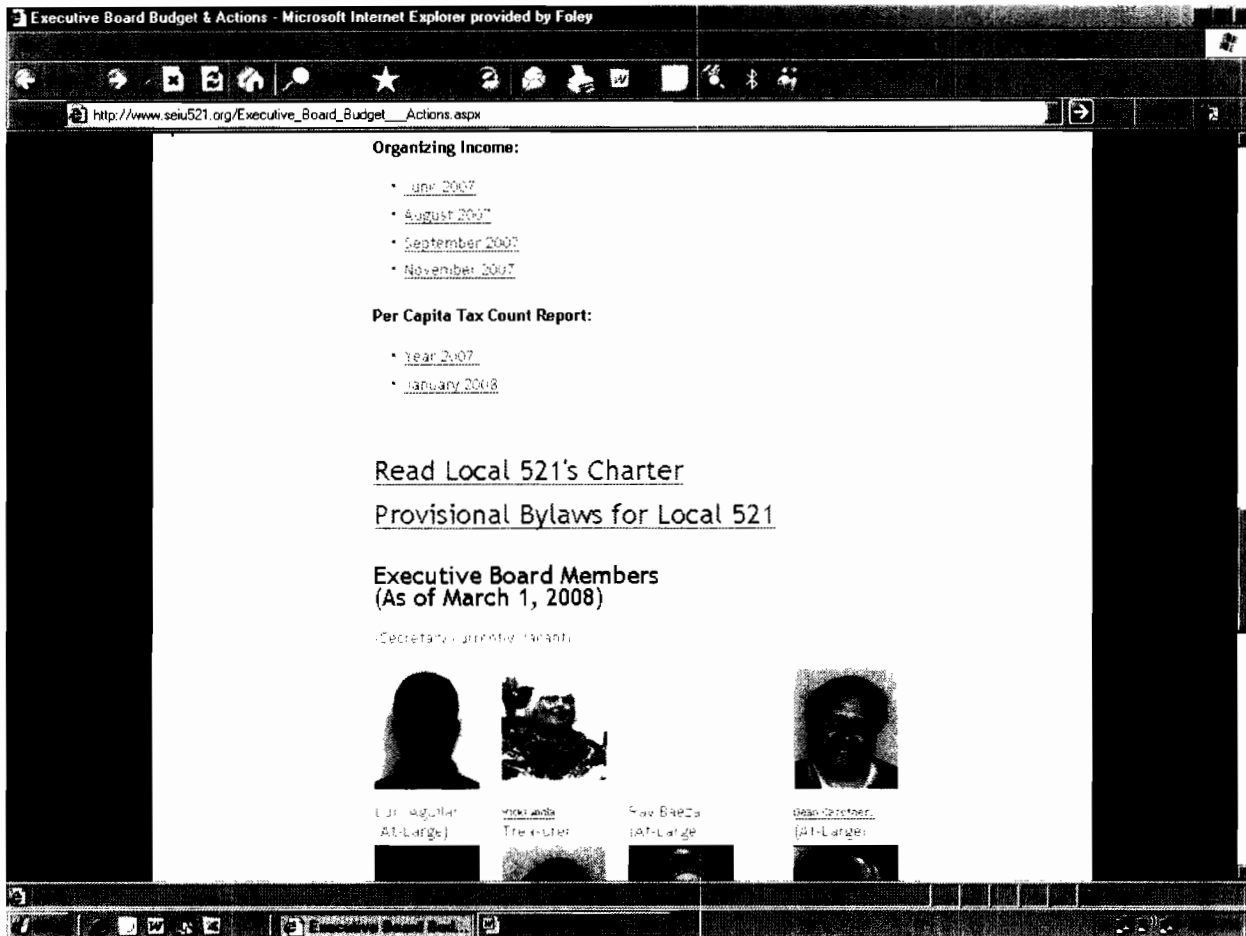
- [Budget for year 2007](#)
- [2008 Budget Assumptions](#)
- [2008 Budget Item Receipts](#)
- [Budget for year 2008](#)

Executive Board Minutes:

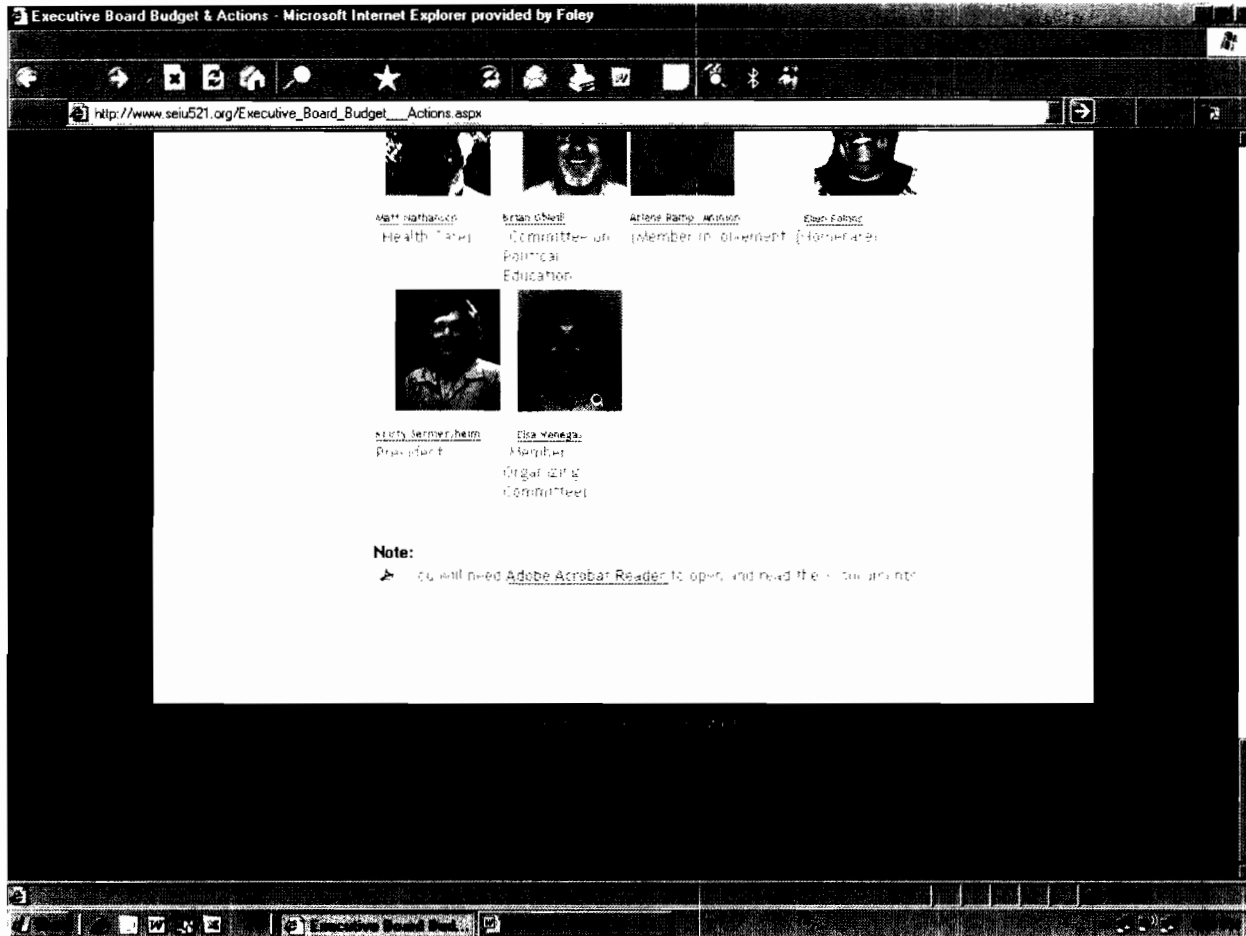
- [April 24, 2007](#)
- [May 3, 2007](#)
- [May 23, 2007](#)
- [June 23, 2007](#)
- [July 24, 2007](#)
- [August 25, 2007](#)
- [September 26, 2007](#)
- [October 23, 2007](#)

SEIU Store









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SEIU Local 521

Bank Balance on Saving and Investment accounts

as of August 31, 2007

ITEMS	GL#	ACCOUNT NAME	Bank	Local	ENDING BALANCE as of 8/31/07
1	NA	LEGAL DEFENSE FUND	NA	521	56,250.00
2	NA	CAPITAL RESERVE	NA	521	43,343.92
3	NA	CLARENCE DODGE SCHOLARSHIP	NA	521	21,701.97
4	1017	BUILDING FUND	Commonwealth Credit Union	715	114,169.00
5	1013	CAPITAL RESERVE	Citizens Funds	715	273,997.89
6	1019	CONTINGENCY FUND	Commonwealth Credit Union	715	80,447.40
7	1011	SANTA CLARA COUNTY CHAPTER FUND	Santa Clara Credit Union	715	15,326.83
8	NA	RETIREE BENEFIT TRUST	NA	715	167,478.58
9	1000	STRIKE FUND	Bank of The West	715	250,000.00
10	1006	STRIKE FUND	Citizens Funds	715	141,155.42
11	1018	STRIKE FUND	Commonwealth Credit Union	715	556,749.24
12	NA	STRIKE FUND	NA	521	112,500.00
13	NA	STRIKE FUND	Bay Federal	415	111,184.81
14	NA	STRIKE FUND as of 7/31/07	@ INTERNATIONAL	521	92,443.26
15		Reserve #1	Union Bank of California	817	94,846.53
16		Reserve #2	Union Bank of California	817	471,320.79
17		Reserve #2	Smith Barney	817	82,092.37
Total reserve					\$ 2,685,007.95
18	NA	STRIKE FUND as of 7/31/07	@ INTERNATIONAL	715	402,140.84
19	NA	STRIKE FUND as of 7/31/07	@ INTERNATIONAL	715	27,001.00

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11	1018	STRIKE FUND	Commonwealth Credit Union	715	336,749.24
12	NA	STRIKE FUND	NA	521	112,500.00
13	NA	STRIKE FUND	Bay Federal	415	111,184.81
14	NA	STRIKE FUND as of 7 31 07	q INTERNATIONAL	521	92,443.20
15		Reserve #1	Union Bank of California	817	94,846.53
16		Reserve #2	Union Bank of California	817	471,320.79
17		Reserve #2	Smith Barney	817	82,092.37
Total reserve					\$ 2,685,007.95
18	NA	STRIKE FUND as of 7 31 07	q INTERNATIONAL	715	402,140.84
19	NA	STRIKE FUND as of 3 31 07	q INTERNATIONAL	415	27,991.88
20	NA	STRIKE FUND as of 2 28 07	q INTERNATIONAL	817	46,016.80
21	NA	STRIKE FUND as of 3 31 07	q INTERNATIONAL	700	69,098.31
					\$ 545,247.83
22		PAC - Candidates	US Bank - Olson	521	29,246.00
23		PAC - Issues	US Bank - Olson	521	2,003.00
24		PAC - Independent Expenditure	US Bank - Olson	521	-
25		PAC - Candidates	US Bank - Olson	715	3,089.44
26		PAC - Issues	US Bank - Olson	715	58.47
27		PAC - Candidates	Union Bank of California	817	12,979.58
28		PAC - Issues	Union Bank of California	817	5,338.43
29		Reserve #1	Morgan Stanley	700	133,318.16 *
30	1003	AGENCY FEE	Bank of The West	521	134,234.15
31	1002	ORGANIZING FUND	Bank of The West	521	1,232,704.98

* - bank statement balance as of June 30, 2007.

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SEIU Local 521
Bank Balance on Saving and Investment accounts
as of September 30 2007

ITEMS	GL#	ACCOUNT NAME	Bank	Local	ENDING BALANCE as of 9 30 07
1	NA	LEGAL DEFENSE FUND	NA	521	65,625.00
2	NA	CAPITAL RESERVE	NA	521	44,343.92
3	NA	CLARENCE DODGE SCHOLARSHIP	NA	521	23,201.97
4	1017	BUILDING FUND	Commonwealth Credit Union	715	114,206.54
5	1013	CAPITAL RESERVE	Citizens Funds	715	274,988.66
6	1019	CONTINGENCY FUND	Commonwealth Credit Union	715	80,447.40
7	1011	SANTA CLARA COUNTY CHAPTER FUND	Santa Clara Credit Union	715	15,326.83
8	NA	RETIREE BENEFIT TRUST	NA	715	177,878.58
9	1000	STRIKE FUND	Bank of The West	715	250,000.00
10	1006	STRIKE FUND	Citizens Funds	715	141,665.84
11	1018	STRIKE FUND	Commonwealth Credit Union	715	558,703.20
12	NA	STRIKE FUND	NA	521	131,250.00
13	NA	STRIKE FUND	Bay Federal	415	111,545.58
14	NA	STRIKE FUND as of 9 30 07	W INTERNATIONAL	521	136,444.40
15	Reserve #1		Union Bank of California	817	94,846.53
16	Reserve #2		Union Bank of California	817	471,320.79
17	Reserve #2		Smith Barney	817	82,092.37
Total reserve					\$ 2,773,887.61
18	NA	STRIKE FUND as of 7 31 07	W INTERNATIONAL	715	402,140.84
19	NA	STRIKE FUND as of 3 31 07	W INTERNATIONAL	415	27,991.88
20	NA	STRIKE FUND as of 2 28 07	W INTERNATIONAL	817	46,016.80
21	NA	STRIKE FUND as of 3 31 07	W INTERNATIONAL	700	69,098.31
					\$ 545,247.83
22		PAC - Candidates	US Bank - Olson	521	56,947.25
23		PAC - Issues	US Bank - Olson	521	3.70
24		PAC - Independent Expenditure	US Bank - Olson	521	4,908.61

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http://www.seiu521.org/Admin/Assets/AssetContent/252a5258-a599-4803-9c22-dd5c796f4333/546ba9e-94e2-495f-9d30-54cc81f55e47/0069c004-483f-4b69-a2

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4	1017	BUILDING FUND	Commonwealth Credit Union	715	114,206.54
5	1013	CAPITAL RESERVE	Citizens Funds	715	274,988.66
6	1019	CONTINGENCY FUND	Commonwealth Credit Union	715	80,447.40
7	1011	SANTA CLARA COUNTY CHAPTER FUND	Santa Clara Credit Union	715	15,326.83
8	NA	RETIREE BENEFIT TRUST	NA	715	177,878.58
9	1000	STRIKE FUND	Bank of The West	715	250,000.00
10	1006	STRIKE FUND	Citizens Funds	715	141,665.84
11	1018	STRIKE FUND	Commonwealth Credit Union	715	558,703.20
12	NA	STRIKE FUND	NA	521	151,250.00
13	NA	STRIKE FUND	Bay Federal	415	111,545.58
14	NA	STRIKE FUND as of 9 30 07	INTERNATIONAL	521	136,444.40
15		Reserve #1	Union Bank of California	817	94,846.53
16		Reserve #2	Union Bank of California	817	471,320.79
17		Reserve #2	Smith Barney	817	82,092.57
Total reserve					\$ 2,773,887.61
18	NA	STRIKE FUND as of 7 31 07	INTERNATIONAL	715	402,140.84
19	NA	STRIKE FUND as of 3 31 07	INTERNATIONAL	415	27,991.88
20	NA	STRIKE FUND as of 2 28 07	INTERNATIONAL	817	46,016.80
21	NA	STRIKE FUND as of 3 31 07	INTERNATIONAL	700	69,098.31
					\$ 545,247.83
22		PAC - Candidates	US Bank - Olson	521	56,947.25
23		PAC - Issues	US Bank - Olson	521	3.70
24		PAC - Independent Expenditure	US Bank - Olson	521	4,908.61
25		PAC - Candidates	US Bank - Olson	715	closed
26		PAC - Issues	US Bank - Olson	715	closed
27		PAC - Candidates	Union Bank of California	817	12,979.58
28		PAC - Issues	Union Bank of California	817	5,338.43
29		Reserve #1	Morgan Stanley	700	133,318.16
30	1003	AGENCY FEE	Bank of The West	521	145,759.58
31	1002	ORGANIZING FUND	Bank of The West	521	1,919,569.76

* - bank statement balance as of June 30, 2007.

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SEIU Local 521

Bank Balance on Saving and Investment accounts
as of November 30, 2007

ITEMS	GL#	ACCOUNT NAME	Bank	Local	ENDING BALANCE as of 11/30/07
1	1005	CONTINGENCY FUND	Bank of The West	521	80,447.40
2	2180	RETIREE BENEFIT TRUST	NA	521	198,747.60
3	2181	CLARENCE DODGE SCHOLARSHIP	NA	521	20,201.97
4	2182	CAPITAL RESERVE	NA	521	321,617.00
5	2183	LEGAL DEFENSE FUND	NA	521	226,178.00
6	2184	BUILDING FUND	NA	521	115,650.00
7	2354	SANTA CLARA COUNTY CHAPTER FUND	Bank of The West	521	15,326.83
8	1006	STRIKE FUND	Bank of The West	521	250,000.00
9	1006	STRIKE FUND	Bank of The West	521	558,006.09
10	2185	STRIKE FUND	NA	521	559,747.00
11	NA	STRIKE FUND as of 10/31/07	W INTERNATIONAL	521	158,643.20
12	NA	STRIKE FUND	Bay Federal	415	111,901.39
13	Reserve #1		Union Bank of California	817	95,333.90
14	Reserve #2		Union Bank of California	817	475,842.81
15	Reserve #3		Smith Barney	817	83,093.78
Total reserve					\$ 3,266,736.97
16	NA	STRIKE FUND as of 7/31/07	W INTERNATIONAL	715	402,140.84
17	NA	STRIKE FUND as of 3/31/07	W INTERNATIONAL	415	27,991.88
18	NA	STRIKE FUND as of 2/28/07	W INTERNATIONAL	817	46,016.80
19	NA	STRIKE FUND as of 3/31/07	W INTERNATIONAL	700	69,098.31
					\$ 545,247.83
20		PAC - Candidates	US Bank - Olson	521	22,244.25
21		PAC - Issues	US Bank - Olson	521	2,050.70
22		PAC - Independent Expenditure	US Bank - Olson	521	24,763.16

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2	2180	RETIREE BENEFIT TRUST	NA	521	198,747.60	
3	2181	CLARENCE DODGE SCHOLARSHIP	NA	521	20,201.97	
4	2182	CAPITAL RESERVE	NA	521	321,617.00	
5	2183	LEGAL DEFENSE FUND	NA	521	226,178.00	
6	2184	BUILDING FUND	NA	521	113,650.00	
7	2334	SANTA CLARA COUNTY CHAPTER FUND	Bank of The West	521	15,326.83	
8	1000	STRIKE FUND	Bank of The West	521	250,000.00	
9	1006	STRIKE FUND	Bank of The West	521	558,006.09	
10	2185	STRIKE FUND	NA	521	559,747.00	
11	NA	STRIKE FUND as of 10 31 07	INTERNATIONAL	521	158,643.20	**
12	NA	STRIKE FUND	Bay Federal	415	111,901.35	
13		Reserve #1	Union Bank of California	817	95,333.90	
14		Reserve #2	Union Bank of California	817	473,842.81	
15		Reserve #2	Smith Barney	817	83,093.78	**
Total reserve					\$ 3,266,736.97	
16	NA	STRIKE FUND as of 7 31 07	INTERNATIONAL	715	402,140.84	
17	NA	STRIKE FUND as of 3 31 07	INTERNATIONAL	415	37,591.88	
18	NA	STRIKE FUND as of 2 28 07	INTERNATIONAL	817	46,016.80	
19	NA	STRIKE FUND as of 3 31 07	INTERNATIONAL	700	69,098.31	
					\$ 545,247.83	
20		PAC - Candidates	US Bank - Olson	521	22,244.25	**
21		PAC - Issues	US Bank - Olson	521	2,050.70	**
22		PAC - Independent Expenditure	US Bank - Olson	521	24,763.16	**
23		PAC - Candidates	Union Bank of California	817	12,961.58	
24		PAC - Issues	Union Bank of California	817	3,323.43	
25		Reserve #1	Morgan Stanley	700	119,856.50	
26	1003	AGENCY FEE	Bank of The West	521	168,283.00	
27	1002	ORGANIZING FUND	Bank of The West	521	1,933,177.04	

** Balance as of 10 31 2007

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SEIU Local 521
Bank Balance on Saving and Investment accounts
as of December 31st, 2007

ITEMS	GL#	ACCOUNT NAME	Bank	Local	ENDING BALANCE as of 12 31 07
1	1005	CONTINGENCY FUND	Bank of The West	521	80,447.40
2	2180	RETIREE BENEFIT TRUST	NA	521	209,147.00
3	2181	CLARENCE DODGE SCHOLARSHIP	NA	521	21,702.00
4	2182	CAPITAL RESERVE	NA	521	322,617.00
5	2183	LEGAL DEFENSE FUND	NA	521	235,553.00
6	2184	BUILDING FUND	NA	521	113,650.00
7	2334	SANTA CLARA COUNTY CHAPTER FUND	Bank of The West	521	15,326.83
8	1000	STRIKE FUND	Bank of The West	521	250,000.00
9	1006	STRIKE FUND	Bank of The West	521	561,206.25
10	2185	STRIKE FUND	NA	521	559,747.00
11	NA	STRIKE FUND as of 11 30 07	INTERNATIONAL	521	180,814.40
12	NA	STRIKE FUND	Bay Federal	415	112,246.81
13		Reserve #1	Union Bank of California	817	95,424.91
14		Reserve #2	Union Bank of California	817	474,315.34
15		Reserve #2	Smith Barney	817	83,093.78
Total reserve					\$ 3,315,291.72
16	NA	STRIKE FUND as of 12 31 07	INTERNATIONAL	715	NA
17	NA	STRIKE FUND as of 3 31 07	INTERNATIONAL	415	27,991.88
18	NA	STRIKE FUND as of 2 28 07	INTERNATIONAL	817	46,016.80
19	NA	STRIKE FUND as of 3 31 07	INTERNATIONAL	730	69,098.31
					\$ 143,106.99
20		PAC - Candidates	US Bank - Olson	521	24,999.40
21		PAC - Issues	US Bank - Olson	521	6,105.83
22		PAC - Independent Expenditure	US Bank - Olson	521	24,763.16
23		PAC - ...	US Bank - Olson	521	13,560.50

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2	2180	RETIREE BENEFIT TRUST	NA	521	209,147.00
3	2181	CLARENCE DODGE SCHOLARSHIP	NA	521	21,702.00
4	2182	CAPITAL RESERVE	NA	521	322,617.00
5	2183	LEGAL DEFENSE FUND	NA	521	235,553.00
6	2184	BUILDING FUND	NA	521	113,650.00
7	2334	SANTA CLARA COUNTY CHAPTER FUND	Bank of The West	521	15,326.83
8	1000	STRIKE FUND	Bank of The West	521	250,000.00
9	1006	STRIKE FUND	Bank of The West	521	561,206.25
10	2185	STRIKE FUND	NA	521	559,747.00
11	NA	STRIKE FUND as of 11/30/07	INTERNATIONAL	521	180,814.40
12	NA	STRIKE FUND	Bay Federal	415	112,246.81
13	Reserve #1		Union Bank of California	817	95,424.91
14	Reserve #2		Union Bank of California	817	474,315.34
15	Reserve #3		Smith Barney	817	83,093.78
Total reserve					\$ 3,315,291.72
16	NA	STRIKE FUND as of 12/31/07	INTERNATIONAL	715	NA
17	NA	STRIKE FUND as of 3/31/07	INTERNATIONAL	415	27,991.88
18	NA	STRIKE FUND as of 2/28/07	INTERNATIONAL	817	46,016.80
19	NA	STRIKE FUND as of 3/31/07	INTERNATIONAL	700	69,098.31
					\$ 143,106.99
20		PAC - Candidates	US Bank - Olson	521	24,999.40
21		PAC - Issues	US Bank - Olson	521	6,105.85
22		PAC - Independent Expenditure	US Bank - Olson	521	24,763.16
23		PAC - Candidates	Union Bank of California	817	12,958.58
24		PAC - Issues	Union Bank of California	817	5,320.43
25		Reserve #1	Morgan Stanley	700	27,580.77
26	1003	AGENCY FEE	Bank of The West	521	180,263.26
27	1003	ORGANIZING FUND	Bank of The West	521	1,945,590.56

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SEIU Local 521
Bank Balance on Saving and Investment accounts
as of Jan. 31st, 2008

ITEMS	GL#	ACCOUNT NAME	Bank	Local	ENDING BALANCE as of 1/31/2008
1	1005	CONTINGENCY FUND	Bank of The West	521	80,447.40
2	2180	RETIREE BENEFIT TRUST	NA	521	218,547.60
3	2181	CLARENCE DODGE SCHOLARSHIP	NA	521	22,951.97
4	2182	CAPITAL RESERVE	NA	521	273,617.70
5	2183	LEGAL DEFENSE FUND	NA	521	195,307.00
6	2184	BUILDING FUND	NA	521	113,650.00
7	2334	SANTA CLARA COUNTY CHAPTER FUND	Bank of The West	521	15,076.83
8	1000	STRIKE FUND	Bank of The West	521	250,000.00
9	1006	STRIKE FUND	Bank of The West	521	562,653.28
10	2185	STRIKE FUND	NA	521	763,503.70
11	NA	STRIKE FUND as of 11/30/07	W INTERNATIONAL	521	180,814.40
12	NA	STRIKE FUND	Bay Federal	415	112,853.46
13	Reserve #1		Union Bank of California	817	95,509.77
14	Reserve #2		Union Bank of California	817	474,757.28
15	Reserve #2		Smith Barney	817	85,093.78
Total reserve					\$ 3,442,784.17
16	PAC - Candidates		US Bank - Olson	521	18,999.40
17	PAC - Issues		US Bank - Olson	521	6,105.85
18	PAC - Independent Expenditure		US Bank - Olson	521	24,763.16
19	PAC - Candidates		Union Bank of California	817	12,955.58
20	PAC - Issues		Union Bank of California	817	5,317.47

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ITEMS	GL#	ACCOUNT NAME	Bank	Local	ENDING BALANCE as of 1/31/2008
1	1003	CONTINGENCY FUND	Bank of The West	521	80,447.40
2	2180	RETIREE BENEFIT TRUST	NA	521	218,547.60
3	2181	CLARENCE DODGE SCHOLARSHIP	NA	521	22,951.97
4	2182	CAPITAL RESERVE	NA	521	273,617.70
5	2183	LEGAL DEFENSE FUND	NA	521	195,307.00
6	2184	BUILDING FUND	NA	521	113,650.00
7	2334	SANTA CLARA COUNTY CHAPTER FUND	Bank of The West	521	15,076.83
8	1000	STRIKE FUND	Bank of The West	521	250,000.00
9	1006	STRIKE FUND	Bank of The West	521	562,653.28
10	2185	STRIKE FUND	NA	521	763,503.70
11	NA	STRIKE FUND as of 11/30/07	INTERNATIONAL	521	180,814.40
12	NA	STRIKE FUND	Bay Federal	415	112,853.46
13		Reserve #1	Union Bank of California	817	95,509.77
14		Reserve #2	Union Bank of California	817	474,757.28
15		Reserve #3	Smith Barney	817	83,093.78
Total reserve					\$ 3,442,784.17
16		PAC - Candidates	US Bank - Olson	521	18,999.40
17		PAC - Issues	US Bank - Olson	521	6,105.85
18		PAC - Independent Expenditure	US Bank - Olson	521	24,763.16
19		PAC - Candidates	Union Bank of California	817	12,955.58
20		PAC - Issues	Union Bank of California	817	5,317.47
21		Reserve #1	Morgan Stanley	700	27,580.77
22	1003	AGENCY FEE	Bank of The West	521	225,222.31
23	1002	ORGANIZING FUND	Bank of The West	521	1,288,235.42

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SEIU Local 521
Dues Receipts of the year of 2007

	A	B	C	D	E	F	G	H	I	J	L
		Mar-07	Apr-07	May-07	Jun-07	Jun-07	Aug-07	Sep-07	Oct-07	Nov-07	YTD 2007
Dues Receipts											
Counties											
4 Dues - Santa Clara County	470,448	524,339	787,487	526,439	528,349	531,773	529,842	799,449	534,889		5,233,044
5 Dues - San Mateo County	119,751	74,084	73,818	80,835	74,292	74,173	112,154	75,557	77,623		762,287
6 Dues - Kern County	259,178	172,739	172,899	173,438	175,510	271,379	183,583	187,293	192,003		1,789,923
7 Dues - San Benito County	11,969	10,763	11,034	10,640	15,154	10,398	10,565	16,318	11,170		108,011
8 Dues - Santa Cruz County	98,732	50,949	148,372	101,453	102,876	106,070	52,079	151,251	102,148		913,990
9 Dues - KINGS County	11,988	5,760	17,118	11,232	5,598	11,196	11,070	5,544	-		79,306
10 Dues - TULARE County	4,376	6,501	9,045	9,861	8,060	9,111	23,612	17,060	3,711		91,338
11 Dues - MONTEREY COUNTY	109,335	142,998	143,495	143,380	147,711	153,549	187,499	154,879	154,776		1,337,622
12 Dues - STANISLAUS COUNTY	-	-	-	-	-	-	155,395	-	-	36,239	191,635
13 Dues - MARIPOSA COUNTY	-	4,890	4,798	5,414	5,665	-	-	-	-	-	20,767
14 Dues - FRESNO COUNTY	-	116,016	347,306	230,008	232,837	239,111	468,354	208,305	240,246		2,082,183
15 Dues - MADERA (COMPA) COUNTY	-	-	-	-	-	-	8,336	-	-	-	8,336
16 Dues - MADERA (SEMC) COUNTY	-	-	-	-	-	-	3,240	-	-	-	3,240
Courts											
18 Dues - Santa Clara Sup Court	39,116	39,290	59,229	39,918	41,282	41,641	41,848	63,541	42,781		408,647
19 Dues - San Mateo Sup Court	14,531	14,663	14,876	15,070	14,912	14,838	22,265	14,996	15,401		141,532
20 Dues - SANTA CRUZ COURT	2,730	5,479	5,570	8,881	5,653	5,627	5,567	8,221	5,655		53,383
21 Dues - SAN BENITO COURT	996	451	929	940	961	943	957	1,447	1,015		8,641
22 Dues - KINGS COURT	1,206	1,224	1,242	1,260	1,260	1,908	1,332	1,332	1,314		12,078
23 Dues - TULARE COURT	3,890	6,741	6,854	4,958	4,958	7,595	5,158	5,130	5,305		50,588
24 Dues - MONTEREY COURT	10,543	-	5,293	5,383	5,487	11,281	5,527	5,519	5,432		54,465
25 Dues - MARIPOSA COURT	-	348	314	324	334	-	-	-	-		1,320
Cities											
27 Dues - City of Menlo Park	8,501	4,276	13,002	8,712	9,175	14,134	8,737	8,850	8,892		84,279
28 Dues - City of Palo Alto	38,654	39,012	39,823	38,718	39,907	62,546	40,185	40,395	40,745		379,965
29 Dues - City of San Jose	3,200	3,606	8,222	8,222	7,712	7,712	7,712	7,712	7,712		54,465

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28	Dues - City of Palo Alto	38,654	39,012	39,823	38,718	39,907	62,546	40,185	40,395	40,745	379,985
29	Dues - City of East Palo Alto	2,299	1,506	833	821	1,743	2,714	1,917	1,875	1,808	15,516
30	Dues - City of Redwood City	15,498	15,548	8,507	23,054	23,120	15,512	15,542	15,604	23,502	155,888
31	Dues - City of San Mateo	6,838	3,397	-	13,528	6,470	6,699	6,723	10,042	6,778	60,474
32	Dues - City of San Mateo GU	8,956	9,071	13,636	4,592	4,599	13,916	9,147	14,024	14,090	92,081
33	Dues - City of Min View	10,796	10,902	16,452	11,032	11,315	11,374	11,368	17,123	11,455	111,817
34	Dues - City of Sunnyvale	1,606	1,623	2,503	1,614	1,585	1,570	1,524	1,551	2,390	15,966
35	Dues - City of EXETER	585	585	585	585	585	624	605	546	566	5,265
36	Dues - City of Delano	5,504	5,511	5,484	5,604	5,687	8,521	5,799	5,681	5,777	53,599
37	Dues - City of Salinas	9,865	10,062	10,156	10,156	9,814	9,787	9,814	9,663	9,539	88,856
38	Dues - City of Santa Cruz	21,256	21,050	23,786	22,448	23,527	23,719	22,746	22,412	24,312	205,257
39	Dues - City of Watsonville	2,444	2,404	3,606	2,422	2,535	2,643	2,621	4,004	2,640	25,320
40	Dues - City of King	689	694	694	347	694	1,045	695	696	674	6,228
41	Dues - City of Hanford	4,365	2,175	6,641	4,400	4,402	3,930	2,161	6,529	4,404	39,006
42	Dues - City of TAFT	517	-	481	157	564	905	249	264	380	3,518
43	Dues - City of WASC0	500	917	1,074	1,074	1,074	537	1,148	1,867	-	8,189
44	Dues - City of CORCORAN	351	312	663	351	312	312	-	351	702	3,354
45	Dues - City of Scotts Valley	1,317	1,342	1,395	1,395	1,395	1,476	1,482	1,489	1,494	12,786
46	Dues - City of Shafter	925	2,696	1,753	1,753	1,756	1,758	1,722	1,723	1,725	15,809
47	Dues - City of Tulare	1,642	4,907	7,871	3,521	3,625	5,594	3,823	4,043	4,180	39,205
48	Dues - City of Bakersfield	25,485	25,565	25,743	25,635	25,745	38,662	26,056	26,261	26,148	245,300
49	Dues - City of HOLLISTER	2,116	1,018	2,973	1,922	2,004	1,932	3,996	-	1,995	17,956
50	Dues - City of COALINGA	536	1,109	1,678	1,159	1,174	1,174	1,724	1,123	1,145	10,822
51	Dues - City of LINDSAY	-	467	240	212	106	304	389	185	185	2,088
52	Dues - City of ARVIN	-	658	660	729	468	847	554	588	533	5,037

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SEIU Local 521
Dues Receipts of the year of 2007

	A	B	C	D	E	F	G	H	I	J	L
1		Mar-07	Apr-07	May-07	Jun-07	Jun-07	Aug-07	Sep-07	Oct-07	Nov-07	YTD 2007
53	Schools										
54	Dues - Santa Clara COE	41,089	40,873	41,237	41,427	41,111	37,842	41,737	42,153	42,631	370,100
55	Dues - San Mateo COE	6,188	6,115	6,108	6,066	6,197	5,522	5,324	5,731	5,886	53,137
56	Dues - Campbell UHSD	2,537	2,559	2,559	2,554	2,856	2,128	2,155	2,498	2,677	22,522
57	Dues - Cupertino USD	9,116	9,316	9,162	9,453	8,302	7,918	8,398	8,975	9,327	79,967
58	Dues - Los Gatos JHSD	4,611	4,542	4,787	4,827	4,648	2,196	2,991	4,922	4,951	38,476
59	Dues - Morgan Hill UHSD	9,920	9,601	9,597	9,942	7,718	3,830	4,658	10,452	10,427	76,144
60	Dues - Orchard Elem.	818	828	889	-	860	797	217	960	984	6,354
61	Dues - West Valley CCD	14,430	14,592	14,552	14,456	14,110	13,233	14,127	15,645	15,630	130,776
62	Dues - Foothill - DeAnza CCD	31,350	31,442	31,274	31,327	31,433	29,538	27,243	28,798	-	242,405
63	Dues - CABRILLO COLLEGE	11,292	11,464	6,561	-	-	-	-	-	-	29,317
64	Dues - GONZALES UNIFIED	187	-	178	178	178	-	-	178	178	1,075
65	Dues - STANDARD SCHOOL	1,285	-	1,285	2,560	-	1,278	734	1,631	1,827	10,599
66	Dues - San Lorenzo Valley USD	3,706	3,669	-	-	-	-	-	14,869	-	22,244
67	Dues - TAFT UNION HIGH SCH	-	1,556	1,556	1,556	1,516	1,073	1,113	1,529	1,529	11,430
68	Dues - EDISON ELEMENTARY	-	480	-	493	493	1,178	221	440	440	3,746
69	Dues - RIVERDALE UNIFIED	-	-	1,441	1,440	1,440	1,398	2,952	1,470	1,620	11,761
70	Dues - LAIDLAW EDUCATION	-	-	-	6,308	166	4,641	29,099	6,277	6,162	52,652
71	Dues - FRESNO UNIFIED SCH	-	-	-	-	26,170	28,606	102,542	26,849	26,708	210,875
72	Dues - FASTA	-	-	-	-	-	-	30,653	6,425	10,094	47,172
73	UHW & L1877										
74	Dues - Santa Clara University	3,686	3,943	3,818	4,073	3,762	5,983	2,153	3,661	3,846	34,924
75	Dues - Bon Appetit Santa C U	24	-	-	-	-	-	-	-	-	24
76	Dues - Standford	40,032	41,760	43,154	45,288	39,644	43,946	42,468	20,486	68,139	384,916
77	Dues - SLAC	10,184	24,519	35,749	13,298	34,453	25,559	24,805	11,260	25,835	205,664

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77	Dues - SLAC	10,184	24,519	35,749	13,298	34,453	25,559	24,805	11,260	25,835	205,664
78	Dues - CSW Hospitals	-	-	-	-	-	-	21,949	-	-	21,949
79	Dues - Cardinal Cogen	990	993	1,000	1,004	922	858	1,648	790	(67)	8,137
80	Dues - Bon Appetit Standford	-	-	-	-	-	-	-	-	-	-
81	Private Non-profit										-
82	Dues - Alliance for Comm Care	9,819	9,617	9,583	13,925	9,175	8,801	8,937	8,607	13,241	91,706
83	Dues - Community Solutions	4,555	1,161	3,971	2,322	1,099	3,511	2,526	2,750	4,312	26,206
84	Dues - Gardner Health	5,733	5,591	8,406	5,906	5,929	6,066	8,789	5,802	5,834	58,056
85	Dues - Rebekah Children's Hm	2,564	2,637	2,521	2,605	2,517	3,830	2,530	2,795	3,110	25,108
86	Dues - SC Bar Foundation	1,745	1,731	1,766	1,643	1,716	1,663	1,733	1,758	1,969	15,725
87	Dues - Starlight	4,263	4,452	4,973	5,182	4,668	5,038	5,054	4,737	5,478	43,844
88	Homecares										-
89	Dues - Addus Health Center	1,267	1,114	1,139	1,145	1,242	1,185	1,210	1,338	1,239	10,879
90	Dues - IHSS San Mateo Co.	46,781	47,519	46,832	47,645	48,548	48,373	50,367	50,039	51,292	437,396
91	Dues - IHSS Santa Clara Co.	194,614	184,800	175,301	190,544	197,732	195,839	195,917	206,883	210,321	1,751,971
92	Dues - MidPen Homecare	-	2,726	4,739	-	3,011	2,308	2,748	4,229	-	19,750
93	Dues - OACM	1,894	2,808	2,023	1,914	2,002	1,876	2,820	1,901	-	17,237
94	Dues - BEAR VALLEY	480	1,411	1,460	976	1,068	1,043	1,001	958	1,445	9,842
95	Special Districts										-
96	Dues - El Camino Hospital	33,140	21,976	21,733	21,637	20,419	27,287	18,133	17,672	19,377	201,375
97	Dues - Housing Authority-SCC	5,798	5,910	8,758	5,731	5,750	5,733	5,728	5,783	10,145	59,337
98	Dues - Humane Society	767	410	750	742	819	770	1,274	837	833	7,202
99	Dues - Valley Transit Authorit	18,233	18,228	27,231	18,666	18,396	18,426	18,370	18,231	27,703	183,483
100	Dues - MACSA	-	5,670	2,880	2,805	3,079	2,848	2,814	-	5,780	25,877
101	Dues - HOPE REHABILITATI	4,792	5,106	4,997	2,699	5,248	5,573	5,356	5,327	5,381	44,478
102	Dues - YOSEMITE CONC	15,175	12,472	24,901	31,508	31,734	49,216	30,601	28,862	27,337	251,804
103	Dues - Community Act Part Ke	11,518	18,182	11,808	9,895	8,460	8,467	2,773	11,590	11,219	93,912
104	Dues - SANTA CRUZ METRG	2,707	2,721	10,772	3,234	2,179	-	2,759	5,494	8,149	38,017
105	Dues - SANTA CRUZ COMM	3,574	-	2,770	1,496	416	511	1,177	1,699	-	11,642
106	Dues - SALUD PARA LA GEN	6,028	-	7,535	2,021	4,842	4,038	4,364	8,725	4,736	42,288
107	Dues - ARVIN-EDISON WAT	688	725	725	725	688	707	1,069	996	615	6,938
108	Dues - COMMUNITY ACT P	920	2,914	2,101	1,890	1,933	3,314	3,197	3,196	3,165	22,630
109	Dues - MONTEREY REGION	1,575	-	-	-	6,233	1,550	1,544	1,489	1,499	13,890
110	Dues - HOPE - SAN JOSE	-	-	-	2,669	-	-	-	-	-	2,669
111	Dues - San Andreas Regional C	15,542	15,962	16,240	16,344	16,068	15,605	(149)	15,627	15,664	126,903
112	Page: 1 of 100	111	111	67	175	111	64	74	74	74	607

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112	Dues - LINDSAY STRATHMO	114	114	57	172	114	95	75	75	75	892
113	Dues - SSJUD	225	213	200	200	200	200	200	200	200	1,838
114	Dues - MONTEREY CHILDRE	1,000	-	1,036	-	-	-	-	-	-	2,026
115	Dues - GOLDEN VALLEY HE	8,140	4,048	12,055	8,242	8,948	9,152	13,895	9,826	9,592	83,899
116	Dues - SAN BENTO CTY W.A	58	285	431	289	352	357	364	375	820	3,382
117	Dues - SOQUEL CREEK WAT	552	974	487	-	974	487	-	974	487	4,935
118	Dues - CHAMBERLAIN'S CH	955	952	766	695	695	-	732	1,560	890	7,245
119	Dues - MARINA COAST WAT	1,292	1,279	1,281	1,235	1,286	1,345	1,342	1,337	1,349	11,747

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SEIU Local 521
Dues Receipts of the year of 2007

	A	B	C	D	E	F	G	H	I	J	L
1		Mar-07	Apr-07	May-07	Jun-07	Jun-07	Aug-07	Sep-07	Oct-07	Nov-07	YTD 2007
120	Dues - MONTEREY BAY UN	979	977	-	-	-	-	-	-	-	1,956
121	Dues - COMMUNITY BRIDGE	487	508	476	506	-	491	1,009	446	533	4,457
122	Dues - WOMEN'S CRISIS SU	537	585	561	559	497	529	511	567	528	4,875
123	Dues - CENTRAL CA LEGAL	1,053	2,156	2,115	2,082	2,165	2,132	2,307	2,520	2,596	19,126
124	Dues - Housing Authority-MRY	3,568	3,503	3,416	3,496	-	6,902	3,467	3,517	3,570	31,439
125	Dues - PENINSULA DENTAL	378	-	-	-	-	-	(378)	-	-	-
126	Dues - CHISPA HOUSING MA	-	1,155	1,665	853	853	-	1,252	864	1,538	8,180
127	Dues - MV PUBLIC TRANSP	-	3,796	1,912	1,856	1,856	1,800	1,828	1,828	1,828	16,702
128	Dues - ACHIEVEKIDS	-	5,645	5,576	5,531	8,303	5,592	5,572	5,500	5,954	47,672
129	Dues - PENINSULA JEWISH C	-	2,029	1,956	-	2,764	877	877	2,229	2,332	13,062
130	Dues - CHILDREN'S SERVICE	-	2,016	-	2,991	2,770	-	3,371	-	3,944	13,092
131	Dues - JEWISH COMM CTR	-	718	694	686	764	-	238	985	1,081	4,666
132	Dues - AMERICAN REDCRO	-	-	2,472	2,429	2,593	2,662	7,372	2,711	2,545	22,785
133	Dues - Housing Authority-FAT	-	-	-	1,419	1,386	2,968	12,834	2,921	2,975	24,502
134	Dues - KERN REGIONAL CENTER	-	-	-	-	-	9,020	44,108	8,491	8,980	70,599
135	Dues - STUDENT TRANSPORTATION	-	-	-	-	-	-	3,290	-	-	3,290

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135	Dues - STUDENT TRANSPORTATION						3,290	-	-	3,290
136	Dues - Associate Members	206	-	472	-	86	-	-	-	764
137	Dues - Retirees	1,701	339	1,690	-	924	1,257	815	765	8,112
138	Dues - 521 Staff Members	1,076	771	1,363	1,824	1,888	2,710	1,598	1,570	14,222
139	Total Dues Receipts	1,937,972	1,960,198	2,661,404	2,182,557	2,224,147	2,412,425	2,867,623	2,595,318	21,199,934
140	Other Income									
141	Interest Dividend Income	-	6,158	7,601	6,986	7,767	10,529	15,063	20,039	78,696
142	Gain Loss on Investment	-	-	-	-	-	-	-	-	-
143	Rebate Income	-	2,247	-	-	-	-	-	-	2,247
144	Rebate Org Income	-	-	-	-	-	-	-	-	-
145	Rental Income	3,311	3,311	3,311	4,626	3,457	3,536	3,391	3,761	32,240
146	Misc. Income	383	61	-	4	234	15	(378)	298	659
147	ADMINISTRATION FEES	-	25,000	-	-	-	-	-	-	50,000
148										
149	Total Receipts	1,941,666	1,996,975	2,672,316	2,194,216	2,235,604	2,426,506	2,885,698	2,619,416	21,363,775

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SEIU Local 521
Financial Statement
For the month of May 2007

	B	M	O	P	Q	AQ	AR	AS
	Mar	Apr		May				
	Actual	Actual	Budget	Actual	better/(worse)	Budget	Actual	better/(worse)
1								
2								
3	1,937,972	1,960,198	2,378,957	2,681,404	284,446	7,130,872	6,559,573	(571,299)
4								
5		6,158	2,400	7,601	5,201	7,200	13,760	6,560
6	-	25,000	5,000	-	(5,000)	15,000	25,000	10,000
7	3,311	3,311	3,600	3,311	(289)	10,800	9,933	(867)
8	383	2,308	-	-	-	-	2,691	2,691
9	3,694	36,777	11,000	10,912	(88)	33,000	51,384	18,384
10								
11	1,941,686	1,996,975	2,387,957	2,672,316	284,359	7,163,872	6,810,956	(552,916)
12								
13								
14								
15	301,077	301,077	301,077	301,077	(0)	903,232	903,232	-
16								
17								
18								
19	29,293	34,472	37,345	34,472	2,873	112,035	98,237	13,797
20	15,732	18,304	37,674	32,391	5,283	113,021	66,427	46,594
21	63,486	65,828	83,896	85,581	16,315	251,688	194,876	56,812
22	179,499	207,013	252,575	218,022	34,553	757,726	604,534	153,192
23	58,721	67,068	68,579	54,179	14,400	205,736	179,967	25,770
24	2,669	3,321	3,337	3,080	257	10,010	9,070	939
25	17,152	21,396	23,217	22,889	328	89,650	81,437	8,213
26	2,889	3,440	5,000	5,190	(190)	15,000	11,519	3,481
27	915	645	3,000	4,275	(1,275)	9,000	5,835	3,165
28	5,611	656	25,331	5,067	20,264	75,993	11,334	64,659
29	376,947	422,143	538,953	446,146	94,807	1,619,858	1,243,236	376,622
30								
31								
32	102,326	28,766	70,927	58,608	12,319	212,781	189,700	23,081
33	30,413	57,561	50,862	26,190	24,473	151,966	114,163	37,803
34	951	3,012	1,500	5,977	(4,377)	4,500	9,841	(5,341)
35	5,977	9,614	3,000	3,634	(634)	9,000	19,225	(10,225)
36	2,209	1,049	10,382	509	9,883	31,176	3,766	27,410
37	15,982	17,963	21,475	17,106	4,369	64,425	51,051	13,374

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7	Sublease Rent	3,311	3,311	3,600	3,311	(289)	10,600	9,933	(667)
8	Misc. Income	383	2,308					2,691	2,691
9	Total Misc. Income	3,694	36,777	11,000	10,912	(88)	33,000	51,364	18,364
10									
11	TOTAL GENERAL FUND INCO	1,941,666	1,996,975	2,387,957	2,672,316	284,369	7,163,872	6,610,956	(552,916)
12									
13	GENERAL FUND EXPENSES								
14									
15	ORGANIZING OFFSET	301,077	301,077	301,077	301,077	(0)	903,232	903,232	-
16									
17	SALARIES								
18	Administrative	29,293	34,472	37,345	34,472	2,673	112,036	98,237	13,797
19	Admin Support	15,732	18,304	37,674	32,391	5,283	113,021	66,427	46,594
20	Directors	63,466	65,828	83,896	85,581	18,315	251,688	194,876	56,812
21	Internal Organizers/Research	179,499	207,013	252,575	218,022	34,553	757,726	604,534	153,192
22	Clerical	58,721	87,068	98,579	54,179	14,400	205,736	179,967	25,770
23	Facilities	2,669	3,321	3,337	3,080	257	10,010	9,070	939
24	Data Base Services	17,152	21,396	23,217	22,889	328	69,650	61,437	8,213
25	Temp. Internal Organizers/Res	2,889	3,443	5,000	5,190	(190)	15,000	11,519	3,481
26	Temp. Clerical/Support	915	645	3,000	4,275	(1,275)	9,000	5,635	3,365
27	Vacation & Comp Time	5,611	656	25,331	5,067	20,264	75,993	11,334	64,659
28	Total Salaries	376,947	422,143	539,963	446,146	94,807	1,619,868	1,243,236	376,622
29	PAYROLL RELATED EXPENSES								
30	Pension	102,326	29,766	70,927	58,608	12,319	212,781	189,700	23,081
31	Payroll Taxes Expenses	30,413	57,561	50,862	26,190	24,473	151,986	114,163	37,823
32	Travel-Staff-Admin	951	3,012	1,500	5,877	(4,377)	4,500	9,841	(5,341)
33	Travel-Staff-Internal Organize	5,977	9,614	3,000	3,634	(634)	9,000	19,226	(10,226)
34	Mileage/Ins. Reimb.-Admin & O	2,209	1,049	10,382	509	9,883	31,176	3,766	27,410
35	Mileage/Ins. Reimb.-Internal Or	15,962	17,963	21,475	17,106	4,369	64,425	51,051	13,374
36	Telephone Reimbursement	3,040	2,238	7,500	2,431	5,069	22,500	7,769	14,731
37	Retiree Health Exp	3,410	7,369	5,701	2,334	3,366	17,102	13,714	3,388
38	Retiree Benefit Trust Fund			10,400		-	31,200	31,200	-
39	Benefits(Health, Dental, Vision,	94,216	168,515	163,718	111,093	52,624	491,153	393,826	97,327
40	Workers Comp Insurance	23,737	7,613	20,698	7,613	13,085	62,096	38,963	23,133
41	Recruiting exp	908	1,394	1,000	1,331	(331)	3,000	3,634	(634)
42	Vacancy Rate (saving)			(88,162)		(88,162)	(264,547)	-	(264,547)
43	Total Payroll Related Expen	283,672	336,154	278,790	247,127	31,663	836,371	876,863	(40,482)
44									
45	Total Salaries & Payroll Expe	660,619	758,297	818,743	692,272	126,470	2,456,229	2,120,098	336,140
46									

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SEIU Local 521
Financial Statement
For the month of May 2007

	B	M	O	P	Q	AQ	AR	AS
	Mar	Apr		May		YTD - Three months		
	Actual	Actual	Budget	Actual	better(worse)	Budget	Actual	better(worse)
47								
48	MISCELLANEOUS							
49	Agency Fee/Assoc. Exp		11,000		-	33,000	33,000	-
50	Capital Fund Expense	1,000	1,000	1,000	-	3,000	3,000	-
51	Admin exp share w. chapter	375	40	302	698	3,000	717	2,283
52	Free Life insurance to members (SCR, MRY & E)	1,200	1,200	2,454	4,348	20,400	3,654	16,746
53	Chapter Fund Reimbursement	3,885	3,074	4,000	3,119	12,000	9,878	2,122
54	Dodge Scholarship	1,500	1,500	1,500	-	4,500	4,500	-
55	Good & Welfare		3,600		3,600	10,800	-	10,800
56	UHW & L1877 ADMIN EXPENSE	181,638	189,849	-	14,356	(14,356)	385,843	(385,843)
57	Total Miscellaneous	199,198	207,663	28,900	33,732	(4,832)	440,693	(363,893)
58								
59	ARBITRATIONS & LEGAL							
60	Arbitrations Fees	7,545	3,909	3,100	1,781	9,300	13,235	(3,935)
61	Retainer	13,262	8,995	21,740	21,781	(51)	44,049	21,171
62	Court Costs			3,300	1,215	2,085	1,215	8,685
63	Miscellaneous			500		500	1,500	1,500
64	Total Arbitrations & Legal	20,807	12,905	28,640	24,787	3,853	58,499	27,421
65								
66	FACILITIES							
67	Rent-SJC + 535SJC	32,718	37,673	34,922	37,731	(2,609)	104,766	(3,354)
68	Rent-RWC	8,114	6,114	8,114	6,130	(18)	18,342	(18)
69	Rent-Bakersfield apartment			1,525		1,525	4,575	4,575
70	Rent-Fresno	6,853	273	6,900	11,793	(4,893)	20,700	18,919
71	Rent-Santa Cruz, Watsonville &	750	7,393	7,333	7,329	4	21,969	15,462
72	Rent-Visalia	2,157	661	700	925	(225)	2,100	3,743
73	Utilities	13,136	5,504	18,200	18,083	117	54,600	36,723
74	Kitchen Sundries	1,716	2550.93	3,500	2,153	1,347	10,500	6,420
75	Gen. Liab. Ins. & Property Tax	5,417	5,417	18,033	5,433	12,600	54,099	16,268
76	Building Maintenance/Security	7,948	1,733	9,000	8,608	392	28,339	(1,339)
77	Total Admin - Facilities	76,806	77,359	106,227	98,187	8,040	318,681	252,351
78								
79	ADMINISTRATIVE - OFFICES							

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51	Admin exp share w. chapter	375	40	1,000	302	696	3,000	717	2,283
52	Free Life insurance to members (SCR, MRY & E		1,200	6,900	2,454	4,346	20,400	3,654	16,746
53	Chapter Fund Reimbursement	3,665	3,074	4,000	3,119	881	12,000	9,878	2,122
54	Dodge Scholarship	1,500	1,500	1,500	1,500	-	4,500	4,500	-
55	Good & Welfare			3,600		3,600	10,800	-	10,800
56	UHW & L1977 ADMIN EXPENSE	181,636	189,849	-	14,356	(14,356)	-	385,843	(385,843)
57	Total Miscellaneous	190,198	207,663	28,900	33,732	(4,832)	86,700	440,693	(363,893)
58									
59	ARBITRATIONS & LEGAL								
60	Arbitrations Fees	7,545	3,909	3,100	1,781	1,319	9,300	13,235	(3,935)
61	Retainer	13,262	8,995	21,740	21,791	(51)	85,220	44,049	21,171
62	Court Costs			3,300	1,215	2,085	9,900	1,215	8,685
63	Miscellaneous			500		500	1,500	-	1,500
64	Total Arbitrations & Legal	20,807	12,905	28,640	24,787	3,853	85,920	58,499	27,421
65									
66	FACILITIES								
67	Rent-SJC + SJCSJC	32,716	37,673	34,922	37,731	(2,809)	104,766	108,120	(3,354)
68	Rent-RWC	6,114	6,114	6,114	6,130	(16)	18,342	18,358	(16)
69	Rent-Bakersfield apartment			1,525		1,525	4,575	-	4,575
70	Rent-Fresno	6,853	273	6,900	11,793	(4,893)	20,700	18,919	1,781
71	Rent-Santa Cruz Watsonville &	750	7,383	7,333	7,329	4	21,966	15,462	6,504
72	Rent-Visalia	2,157	661	700	925	(225)	2,100	3,743	(1,643)
73	Utilities	13,135	5,504	18,200	18,083	117	54,600	36,723	17,877
74	Kitchen Sundries	1,716	2550.93	3,500	2,153	1,347	10,500	6,420	4,080
75	Gen. Liab. ins. & Property Tax	5,417	5,417	18,033	5,433	12,600	54,099	16,268	37,831
76	Building Maintenance/Security	7,948	11,783	9,000	8,608	382	27,000	28,339	(1,339)
77	Total Admin - Facilities	76,806	77,359	106,227	98,187	8,040	318,681	262,361	56,320
78									
79	ADMINISTRATIVE - OFFICES								
80	Audit/Act. Fees	910	901	10,000	13,025	(3,025)	30,000	14,836	15,164
81	Subscriptions		171	500	647	(147)	1,500	618	682
82	Office Sundries	8,184	4,355	7,000	13,187	(5,187)	21,000	25,726	(4,726)
83	Office Equipment Leases	36,592	44,816	40,000	25,726	14,274	120,000	107,134	12,866
84	Equipment Maintenance & Rep.	3,628	3,575	8,000	5,919	2,081	24,000	19,123	4,877
85	Contributions			500	283	217	1,500	263	1,217
86	Research Material & Data			2,000		2,000	6,000	-	6,000
87	Dues Implementation			600		600	1,800	-	1,800
88	Computer Database Services	681	2,492	10,000	777	9,223	30,000	4,141	25,859
89	Miscellaneous		750	1,000		1,000	3,000	750	2,250
90	Total Admin - Offices	50,195	63,051	79,600	59,564	20,036	238,800	172,811	65,989

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SEIU Local 521
Financial Statement
For the month of May 2007

	B	J	M	O	P	Q	AQ	AR	AS
	Mar	Apr			May				
	Actual	Actual	Budget	Actual	better/worse	Budget	Actual	better/worse	
92 COMMUNICATIONS									
93 Printing	12,836	11,799	8,000	7,881	119	24,000	32,516	(8,516)	
94 Paper	2,445	1,244	4,000	2,404	1,596	12,000	6,092	5,908	
95 Website/Station/communication	719	799	1,500	453	1,047	4,500	1,971	2,529	
96 Telephone & Internet	13,223	11,744	18,000	13,188	4,812	54,000	38,155	15,845	
97 Postage	7,775	3,434	8,000	7,296	(1,296)	18,000	18,555	(555)	
98 Professional Fees/Translations		55	1,000	120	880	3,000	175	2,825	
99 Total Communications	36,998	29,125	38,500	31,342	7,158	115,600	97,465	18,035	
100									
101 CONFERENCES/MILEAGE									
102 Staff-Misc. Conf/Seminar			2,000		2,000	6,000	-	6,000	
103 Exec. Board-Conferences			1,000		1,000	3,000	-	3,000	
104 International Convention			-		-	-	-	-	
105 Industries & Members Conferences			1,000	1,500	(500)	3,000	1,500	1,500	
106 Misc. Members-Reimbursed			500		500	1,500	-	1,500	
107 Total Conferences/Mileage	-	-	4,500	1,500	3,000	13,600	1,500	12,000	
108									
109 STAFF MEETING & TRAINING									
110 Director Training			2,000	1,845	155	6,000	1,845	4,155	
111 Staff - representation & political	4,360	7,456	10,000	662	9,338	30,000	12,478	17,522	
112 Clerical Staff		1,392	800	259	541	2,400	1,651	749	
113 Executive Staff	2,742		800	886	(86)	2,400	3,627	(1,227)	
114 Tuition Reim -Internal Organizers			500		500	1,500	-	1,500	
115 Tuition Reim -OPEIU			500		500	1,500	-	1,500	
116 Total Staff Training	7,102	8,848	14,600	3,652	10,948	43,800	19,602	24,198	
117									
118 EDUCATION & TRAINING									
119 Steward & Chief Steward Training			300		300	900	-	900	
120 Executive Board			500		500	1,500	-	1,500	
121 Education & Training Committee Meeting & Materials			4,000		4,000	12,000	-	12,000	
122 Industry Training Events			2,000		2,000	6,000	-	6,000	
123 Total Education & Training	-	-	6,800	-	6,800	20,400	-	20,400	
124									

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95	Telephone & Internet	13,223	11,744	18,000	13,188	4,812	54,000	38,155	15,845
97	Postage	7,775	3,484	6,000	7,296	(1,296)	18,000	18,555	(555)
98	Professional Fees/Translations		55	1,000	120	880	3,000	175	2,825
99	Total Communications	38,998	29,125	38,500	31,342	7,188	115,500	97,465	18,035
100									
101	CONFERENCES/MILEAGE								
102	Staff Misc. Conf/Seminar			2,000		2,000	6,000	-	6,000
103	Exec Board-Conferences			1,000		1,000	3,000	-	3,000
104	International Convention			-		-	-	-	-
105	Industries & Members Conferences			1,000	1,500	(500)	3,000	1,500	1,500
106	Misc. Members-Reimbursed			500		500	1,500	-	1,500
107	Total Conferences/Mileage			4,500	1,500	3,000	13,500	1,500	12,000
108									
109	STAFF MEETING & TRAINING								
110	Director Training			2,000	1,845	155	6,000	1,845	4,155
111	Staff - representation & political	4,360	7,456	10,000	862	9,338	30,000	12,478	17,522
112	Clerical Staff		1,392	800	259	541	2,400	1,651	749
113	Executive Staff	2,742		800	886	(86)	2,400	3,627	(1,227)
114	Tuition Reim -Internal Organizers			500		500	1,500	-	1,500
115	Tuition Reim -OPEIU			500		500	1,500	-	1,500
116	Total Staff Training	7,102	8,848	14,600	3,652	10,948	43,800	19,502	24,198
117									
118	EDUCATION & TRAINING								
119	Steward & Chief Steward Training			300		300	900	-	900
120	Executive Board			500		500	1,500	-	1,500
121	Education & Training Committee Meeting & Materials			4,000		4,000	12,000	-	12,000
122	Industry Training Events			2,000		2,000	6,000	-	6,000
123	Total Education & Training			6,800		6,800	20,400		20,400
124									
125	POLITICAL/SOCIAL INVOLVEMENT								
126	Candidates Account (\$0.10 per	7,930	9,412	6,000	9,579	(3,579)	18,000	26,921	(8,921)
127	Issues Account			-		-	-	-	-
128	Legal			4,000		4,000	12,000	-	12,000
129	Committee Meetings	91	96	300	68	232	900	245	655
130	Conferences			2,000		2,000	6,000	-	6,000
131	Electoral Staff Activity			300		300	900	-	900
132	Polls & Surveys			500		500	1,500	-	1,500
133	Special Printing			200		200	600	-	600
134	Subscriptions			25		25	75	-	75
135	Total Political/Social Invol	8,021	9,498	13,325	9,647	3,678	39,975	27,166	12,809

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SEIU Local 521
Financial Statement
For the month of May 2007

	B	J	M	O	P	Q	AQ	AR	AS
	Mar	Apr			May		YTD - Three months		
	Actual	Actual	Budget	Actual	better(worse)	Budget	Actual	better(worse)	
136									
137	SOCIAL & ECONOMIC JUSTICE								
138	Committee Meetings		300	22	278	900	22	878	
139	Conferences	778	300		300	900	778	122	
140	Contributions/Solidarity	500	200		200	600	500	100	
141	*** \$1.00 PER MEMBER	4,588	312	3,125	1,182	1,943	9,375	6,082	3,293
142	Total Social & Economic J	5,867	312	3,925	1,204	2,721	11,775	7,382	4,393
143									
144	MEMBER INVOLVEMENT								
145	Memorabilia/Give away Membe	927	20,716	5,000	17,280	(12,280)	15,000	38,922	(23,922)
146	Awards/Recognition	500		300		300	900	500	400
147	Planning & Event Prep			300		300	900	-	900
148	Ex Board / Advisory Board Reimbursement			500		500	1,500	-	1,500
149	Rally Rental & Bus		3,570	4,000	1,945	2,055	12,000	5,515	6,485
150	Member Reimbursement/Lost time		283	5,000	831	4,169	15,000	1,114	13,886
151	Transportation & Vehicle Exper	134		500		500	1,500	134	1,366
152	Total Member Involvement	1,561	24,589	15,600	20,056	(4,468)	46,800	46,186	614
153									
154	NEGOTIATIONS								
155	Printing Contracts	30,237		5,000		5,000	15,000	30,237	(15,237)
156	Meetings & Supplies	445	1,690	5,000	1,087	3,913	15,000	3,222	11,778
157	Negotiations Committee Food			5,000		5,000	15,000	-	15,000
158	Strike Preparations			1,000		1,000	3,000	-	3,000
159	Automatic Strike Fund Transfer (\$0.50 per member/mom)			18,750		18,750	56,250	-	56,250
160	Total Negotiations	30,682	1,690	34,750	1,087	33,663	104,250	33,469	70,791
161									
162	MEETINGS & EVENTS								
163	Executive Board Meetings			2,000	106	1,892	6,000	106	5,892
164	Steward/Council meetings	294	99	4,500	5,484	(984)	13,500	5,677	7,623
165	EQT Party & other events	2,595	5,386	7,000	22,719	(15,719)	21,000	31,200	(10,200)
166	Advisory Board Meetings	15,570		10,000	-	10,000	30,000	15,570	14,430
167	Miscellaneous			200		200	600	-	600
168	Total Meetings & Events	18,459	5,985	23,700	26,311	(4,611)	71,100	52,756	18,346

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140	Contributions/Solidarity	500		200		200	600	500	100
141	*** \$1.00 PER MEMBER	4,586	312	3,125	1,182	1,943	9,375	6,062	3,293
142	Total Social & Economic J	6,067	312	3,925	1,204	2,721	11,775	7,382	4,393
143									
144	MEMBER INVOLVEMENT								
145	Memorabilia/Give away Membe	927	20,716	5,000	17,280	(12,260)	15,000	38,822	(23,922)
146	Awards/Recognition	500		300		300	900	500	400
147	Planning & Event Prep			300		300	900	-	900
148	Ex Board / Advisory Board Reimbursement			500		500	1,500	-	1,500
149	Raily Rental & Bus		3,570	4,000	1,945	2,055	12,000	5,515	6,485
150	Member Reimbursement/Lost time		283	5,000	831	4,169	15,000	1,114	13,866
151	Transportation & Vehicle Exper	134		500		500	1,500	134	1,366
152	Total Member Involvement	1,561	24,569	15,800	20,066	(4,468)	46,800	46,186	814
153									
154	NEGOTIATIONS								
155	Printing Contracts	30,237		5,000		5,000	15,000	30,237	(15,237)
156	Meetings & Supplies	445	1,690	5,000	1,087	3,913	15,000	3,222	11,776
157	Negotiations Committee Food			5,000		5,000	15,000	-	15,000
158	Strike Preparations			1,000		1,000	3,000	-	3,000
159	Automatic Strike Fund Transfer (\$0.50 per member/mom)			18,750		18,750	56,250	-	56,250
160	Total Negotiations	30,682	1,690	34,750	1,087	33,663	104,250	33,459	70,791
161									
162	MEETINGS & EVENTS								
163	Executive Board Meetings			2,000	106	1,882	6,000	106	5,892
164	Steward/Council meetings	294	99	4,500	5,484	(984)	13,500	5,677	7,623
165	52T Party & other events	2,595	5,896	7,000	22,719	(15,719)	21,000	31,200	(10,200)
166	Advisory Board Meetings	15,570		10,000	-	10,000	30,000	15,570	14,430
167	Miscellaneous			200		200	600	-	600
168	Total Meetings & Events	18,459	5,995	23,700	26,311	(4,611)	71,100	52,755	18,345
169									

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SEIU Local 521
Financial Statement
For the month of May 2007

	B	J Mar	M Apr	O	P May	Q	AQ	AR	AS
		Actual	Actual	Budget	Actual	better(worse)	Budget	Actual	better(worse)
170 REPRESENTATIVE DUES									
171 SEIU \$7.65 ea		571,916	388,333	430,848	397,907	32,941	1,292,544	1,356,158	(63,614)
172 SEIU Unity Fund \$5.00ea		347,500	238,740	266,200	247,290	18,910	798,600	833,530	(34,930)
173 SEIU Retirees \$1.00ea		-	-	60	-	60	180	-	180
174 SEIU Associate Members-1.00		-	-	12	-	12	36	-	36
175 SEIU State Council-\$2.53ea		197,069	126,639	142,490	130,547	11,942	427,469	454,276	(26,807)
176 So Bay CLC \$0.55ea		20,896	11,230	12,100	11,172	928	36,300	43,300	(7,000)
177 SMCO CLC \$0.60ea		4,965	2,571	2,838	2,440	398	8,514	9,976	(1,462)
178 Fresno CLC \$0.35ea		510	1,619	2,800	1,950	851	8,400	4,079	4,321
179 Bakersfield CLC \$0.25ea		-	1,585	1,625	1,753	(128)	4,875	3,338	1,537
180 Monterey & Santa Cruz LC \$0.4		1,680	2,648	3,300	3,605	(305)	9,900	8,133	1,767
181 CA Labor Fed 50% X .47ea		13,261	8,901	9,048	9,167	(120)	27,143	31,329	(4,186)
182 Building Trades-SMCO		250	250	250	250	-	750	750	-
183 Total Representative Dues		1,158,271	786,517	871,570	806,081	65,489	2,614,710	2,744,869	(130,159)
184									
185 TOTAL EXPENSES		2,584,563	2,280,894	2,390,467	2,112,489	277,968	7,171,372	6,977,966	193,418
186									
187 TOTAL INCOME LESS TOTAL		(642,897)	(283,919)	(2,500)	588,817	662,316	(7,500)	(366,999)	(369,500)
188									
189 VOLUNTARY TRANSFERS									
190 Building Funds		-	-	-	-	-	-	-	-
191 Automatic Legal Defense Fund		-	-	9,375	-	-	28,125	28,125	-
192 Strike Fund		-	-	-	-	-	-	-	-
193 Total Transfers		9,375	9,375	9,375	9,375	-	28,125	28,125	-
194 TOTAL INCOME LESS EXPEN		(652,272)	(293,294)	(11,875)	560,442	662,316	(36,625)	(396,124)	(369,500)

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174	SEIU Associate Members-1.00	-	-	12	-	12	36	-	36
175	SEIU State Council-\$2.53ea	197,089	126,639	142,490	130,547	11,942	427,469	454,276	(26,807)
176	So Bay CLC \$0.55ea	20,896	11,230	12,100	11,172	928	36,300	43,300	(7,000)
177	SMCO CLC \$0.63ea	4,965	2,571	2,838	2,440	366	8,514	9,976	(1,462)
178	Fresno CLC \$0.35ea	510	1,619	2,800	1,950	851	8,400	4,079	4,321
179	Bakersfield CLC \$0.25ea	-	1,585	1,625	1,753	(128)	4,875	3,338	1,537
180	Monterey & Santa Cruz LC \$0.5	1,680	2,548	3,300	3,605	(305)	9,900	8,133	1,767
181	CA Labor Fed 50% x .47ea	13,261	8,901	9,048	9,167	(120)	27,143	31,329	(4,186)
182	Building Trades-SMCO	250	250	250	250	-	750	750	-
183	Total Representative Dues	1,158,271	760,517	871,570	806,081	66,489	2,614,710	2,744,868	(130,158)
184									
185	TOTAL EXPENSES	2,584,563	2,280,894	2,390,457	2,112,499	277,958	7,171,372	6,977,955	193,416
186									
187	TOTAL INCOME LESS TOTAL	(842,897)	(283,919)	(2,500)	559,817	562,316	(7,500)	(366,999)	(359,500)
188									
189	VOLUNTARY TRANSFERS								
190	Building Funds								
191	Automatic Legal Defense Fund			9,375		-	28,125	28,125	-
192	Strike Fund					-	-	-	-
193	Total Transfers	9,375	9,375	9,375	9,375	-	28,125	28,125	-
194	TOTAL INCOME LESS EXPEN	(652,272)	(293,294)	(11,875)	550,442	562,316	(35,625)	(395,124)	(359,500)

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SEIU Local 521
Financial Statement
For the month of June 2007

	B	J Mar	M Apr	P May	R	S Jun	T	AQ	AR	AS
		Actual	Actual	Actual	Budget	Actual	better/(worse)	Budget	Actual	better/(worse)
3	TOTAL DUES RECEIPTS	1,937,972	1,960,199	2,861,404	2,376,957	2,182,557	(194,400)	9,507,829	8,742,130	(765,699)
4	OTHER INCOME									
5	Interest & Dividends	-	6,158	7,801	2,400	6,986	4,586	9,600	20,745	11,145
6	SMHSS Administrative Reimb	-	25,000	-	5,000	-	(5,000)	20,000	25,000	5,000
7	Sublease Rent	3,311	3,311	3,311	3,800	4,626	1,026	14,400	14,559	159
8	Misc Income	383	2,308	-	-	47	47	-	2,738	2,738
9	Total Misc. Income	3,694	36,777	10,912	11,000	11,659	659	44,000	63,042	19,042
10										
11	TOTAL GENERAL FUND INCO	1,941,666	1,996,975	2,872,316	2,387,957	2,194,216	(193,741)	9,551,829	8,805,173	(746,657)
12										
13	GENERAL FUND EXPENSES									
14										
15	ORGANIZING OFFSET	301,077	301,077	301,077	301,077	301,077	(0)	1,204,310	1,204,309	(0)
16										
17	SALARIES									
18	Administrative	29,293	34,472	34,472	37,345	34,472	2,873	149,380	132,710	16,670
19	Admin Support	15,732	18,304	32,391	37,874	32,284	5,410	150,694	98,691	52,004
20	Directors	63,466	65,828	65,581	83,896	71,063	12,833	335,584	285,939	69,645
21	Internal Organizers/Research	179,499	207,013	218,022	252,575	248,018	4,557	1,010,301	852,552	157,749
22	Clerical	56,721	67,066	54,179	69,579	55,436	13,142	274,315	235,403	38,912
23	Facilities	2,669	3,321	3,080	3,337	3,362	(26)	13,346	12,433	914
24	Data Base Services	17,152	21,396	22,889	23,217	23,847	(631)	92,866	85,284	7,582
25	Temp. Internal Organizers/Res	2,689	3,440	5,190	5,000	2,964	2,036	20,000	14,463	5,517
26	Temp. Clerical/Support	915	645	4,275	3,000	5,742	(2,742)	12,000	11,577	423
27	Vacation & Comp Time	5,611	656	5,067	25,331	5,921	19,410	101,324	17,255	84,069
28	Total Salaries	375,947	422,143	445,146	539,953	483,091	56,862	2,159,811	1,726,326	433,484
29	PAYROLL RELATED EXPENSES									
30	Pension	102,326	28,766	58,608	70,927	61,103	9,824	283,706	250,803	32,905
31	Payroll Taxes Expenses	30,413	57,581	28,190	50,692	29,002	21,661	202,649	143,165	59,484
32	Travel: Staff-Admin	951	3,012	5,877	1,500	434	1,066	6,000	10,275	(4,275)
33	Travel: Staff-Internal Organizers	5,977	9,614	3,634	3,000	1,756	1,244	12,000	20,961	(8,961)
34	Mileage/Ins. Reimb -Admin & O	2,209	1,049	509	10,392	3,639	6,753	41,568	7,405	34,163
35	Mileage/Ins. Reimb -Internal Or	15,982	17,963	17,106	21,475	19,717	1,758	85,900	70,768	15,132

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7	Sublease Rent	3,311	3,311	3,311	3,600	4,626	1,026	14,400	14,559	159
8	Misc Income	383	2,308			47	47		2,738	2,738
9	Total Misc. Income	3,694	36,777	10,912	11,000	11,659	659	44,000	63,042	19,042
10										
11	TOTAL GENERAL FUND INCOME	1,941,666	1,996,975	2,672,316	2,387,957	2,194,216	(193,741)	9,551,629	8,805,173	(746,667)
12										
13	GENERAL FUND EXPENSES									
14										
15	ORGANIZING OFFSET	301,077	301,077	301,077	301,077	301,077	(0)	1,204,310	1,204,309	(0)
16										
17	SALARIES									
18	Administrative	29,293	34,472	34,472	37,345	34,472	2,873	149,380	132,710	16,670
19	Admin Support	15,732	18,304	32,391	37,674	32,264	5,410	150,694	98,691	52,004
20	Directors	63,466	65,828	65,581	63,896	71,063	12,833	335,584	265,939	69,645
21	Internal Organizers/Research	179,499	207,013	218,022	252,575	248,018	4,557	1,010,301	852,552	157,749
22	Clerical	58,721	67,088	54,179	68,579	55,436	13,142	274,315	235,403	38,912
23	Facilities	2,669	3,321	3,080	3,337	3,362	(28)	13,346	12,433	914
24	Data Base Services	17,152	21,396	22,889	23,217	23,847	(631)	92,866	85,264	7,582
25	Temp Internal Organizers/Res	2,888	3,440	5,190	5,030	2,964	2,036	20,000	14,463	5,537
26	Temp Clerical/Support	915	645	4,275	3,030	5,742	(2,742)	12,000	11,577	423
27	Vacation & Comp Time	5,611	656	5,087	25,331	5,921	19,410	101,324	17,255	84,069
28	Total Salaries	376,947	422,143	446,146	539,953	483,991	56,862	2,169,811	1,726,326	433,484
29	PAYROLL RELATED EXPENSES									
30	Pension	102,326	28,766	58,908	70,927	61,103	9,824	293,708	250,803	32,905
31	Payroll Taxes Expenses	30,413	57,581	26,190	50,652	29,002	21,651	202,648	143,165	59,484
32	Travel Staff-Admin	951	3,012	5,877	1,530	434	1,096	6,000	10,275	(4,275)
33	Travel Staff-Internal Organizer	5,977	9,614	3,634	3,030	1,758	1,244	12,000	20,981	(8,981)
34	Mileage/Ins. Reimb -Admin & D	2,209	1,049	509	10,392	3,639	6,753	41,568	7,405	34,163
35	Mileage/Ins. Reimb -Internal Or	15,982	17,963	17,106	21,475	19,717	1,758	85,900	70,768	15,132
36	Telephone Reimbursement	3,040	2,298	2,431	7,530	2,457	5,043	30,000	10,226	19,774
37	Retiree Health Exp	3,410	7,969	2,334	5,731	3,236	2,484	22,802	16,950	5,852
38	Retiree Benefit Trust Fund				10,400			41,600	41,600	
39	Benefits/Health, Dental, Vision	94,218	188,515	111,093	163,718	114,959	48,758	654,871	508,785	146,085
40	Workers Comp Insurance	23,737	7,613	7,613	20,698	12,613	8,085	82,794	51,576	31,218
41	Recruiting exp	908	1,394	1,331	1,030	1,175	(175)	4,000	4,810	(810)
42	Vacancy Rate (saving)				(88,182)		(88,182)	(352,730)		(352,730)
43	Total Payroll Related Expense	293,672	336,154	247,127	278,790	260,491	18,299	1,115,161	1,137,344	(22,183)
44										
45	Total Salaries & Payroll Expense	669,619	758,297	692,272	818,743	743,582	75,161	1,637,486	1,427,816	209,670

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SEIU Local 521
Financial Statement
For the month of June 2007

	B	J	M	P	R	S	T	AQ	AR	AS
		Mar	Apr	May	Jun	Jun		YTD - Four months		
		Actual	Actual	Actual	Budget	Actual	better(worse)	Budget	Actual	better(worse)
46										
47										
48	MISCELLANEOUS									
49	Agency Fee/Assoc. Exp.				11,030	-	-	44,000	44,000	-
50	Capita Fund Expense	1,000	1,000	1,000	1,000	1,000	-	4,000	4,000	-
51	Admin exp share w chapter	375	40	302	1,000	1,000	1,000	4,000	717	3,283
52	Free Life insurance to members (SCR, MRY & E	1,200	1,200	2,454	5,830	1,227	5,573	27,200	4,881	22,319
53	Chapter Fund Reimbursement	3,685	3,074	3,119	4,000	3,893	107	16,000	13,770	2,230
54	Dodge Scholarship	1,500	1,500	1,500	1,500	1,500	-	6,000	6,000	-
55	Good & Welfare				3,600	3,600	-	14,400	-	14,400
56	UHW & L 1877 ADMIN EXPENSE	181,636	189,849	14,358	-	39,412	(39,412)	-	425,256	(425,256)
57	Total Miscellaneous	199,198	207,663	33,732	28,900	58,032	(29,132)	115,600	498,626	(383,026)
58										
59	ARBITRATIONS & LEGAL									
60	Arbitrations Fees	7,545	3,909	1,781	3,100	8,374	(5,274)	12,400	21,809	(9,209)
61	Retainer	13,282	8,995	21,791	21,740	11,237	10,503	88,960	55,286	31,674
62	Court Costs			1,215	3,300	3,300	-	13,200	1,215	11,985
63	Miscellaneous				500	500	-	2,000	-	2,000
64	Total Arbitrations & Legal	20,807	12,905	24,787	28,640	19,611	9,029	114,560	78,110	36,450
65										
66	FACILITIES									
67	Rent-SJC + S35SJC	32,716	37,673	37,731	34,922	37,643	(2,721)	139,688	145,763	(6,075)
68	Rent-RWC	6,114	6,114	6,130	6,114	6,130	(16)	24,456	24,466	(10)
69	Rent-Bakersfield apartment				1,525	1,525	-	6,100	-	6,100
70	Rent-Fresno	6,853	273	11,793	6,900	11,425	(4,525)	27,600	30,344	(2,744)
71	Rent-Santa Cruz Watsonville &	750	7,383	7,329	7,313	7,329	4	29,332	22,792	6,540
72	Rent-Visalia	2,157	661	925	700	661	39	2,800	4,404	(1,604)
73	Utilities	13,135	5,504	18,083	18,200	16,099	2,101	72,800	52,821	19,979
74	Kitchen Sundries	1,716	2,550.93	2,153	3,500	2,328	1,172	14,000	8,747	5,253
75	Gen. Liab. Ins. & Property Tax	5,417	5,417	5,433	18,013	8,089	9,924	72,131	34,357	37,774
76	Building Maintenance/Security	7,948	11,783	8,608	9,000	17,551	(8,551)	36,000	45,869	(9,869)
77	Total Admin - Facilities	76,806	77,359	98,187	106,227	107,255	(1,028)	424,907	358,606	66,301
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50	Capita Fund Expense	1,000	1,000	1,000	1,000	1,000	-	4,000	4,000	-
51	Admin exp share w. chapter	375	40	302	1,000	-	000	4,000	717	3,283
52	Free Life Insurance to members (SCR, MRY & E	1,200	2,454	6,800	1,227	5,573	27,200	4,881	22,319	
53	Chapter Fund Reimbursement	3,685	3,074	3,119	4,000	3,893	107	16,000	13,770	2,230
54	Dodge Scholarship	1,500	1,500	1,500	1,500	1,500	-	6,000	6,000	-
55	Good & Welfare	-	-	-	3,600	3,600	-	14,400	-	14,400
56	UHW & L1877 ADMIN EXPENSE	181,636	189,849	14,356	-	39,412	(39,412)	-	425,256	(425,256)
57	Total Miscellaneous	189,186	207,663	33,732	28,900	58,032	(29,132)	115,600	498,625	(383,025)
58										
59	ARBITRATIONS & LEGAL									
60	Arbitrations Fees	7,545	3,909	1,781	3,100	5,374	(5,274)	12,400	21,609	(9,209)
61	Retainer	13,262	8,995	21,791	21,740	11,237	0,503	96,960	55,296	31,674
62	Court Costs	-	-	1,215	3,300	3,300	-	13,200	1,215	11,985
63	Miscellaneous	-	-	-	500	500	-	2,000	-	2,000
64	Total Arbitrations & Legal	20,807	12,905	24,787	28,640	19,611	9,029	114,560	78,110	36,450
65										
66	FACILITIES									
67	Rent-SJC + SJCSJC	32,716	37,673	37,731	34,922	37,643	(2,721)	139,668	145,763	(6,095)
68	Rent-RWC	6,114	6,114	6,130	6,114	6,130	(16)	24,456	24,488	(32)
69	Rent-Bakersfield apartment	-	-	-	1,525	1,525	-	6,100	-	6,100
70	Rent-Fresno	6,863	273	11,793	6,900	11,425	(4,525)	27,600	30,344	(2,744)
71	Rent-Santa Cruz, Watsonville &	750	7,383	7,329	7,333	7,329	4	29,332	22,792	6,540
72	Rent-Visalia	2,187	661	825	700	661	39	2,800	4,404	(1,604)
73	Utilities	13,135	5,504	18,093	18,290	16,099	2,191	72,800	52,821	19,979
74	Kitchen Sundries	1,716	2,650.83	2,153	3,500	2,328	1,172	14,000	6,747	7,253
75	Gen. Lab. Ins. & Property Tax	5,417	5,417	5,433	18,033	8,089	9,943	72,131	24,357	47,775
76	Building Maintenance/Security	7,948	11,783	8,608	9,000	17,551	(8,551)	36,000	45,889	(9,889)
77	Total Admin - Facilities	76,806	77,359	98,167	106,227	107,255	(1,028)	424,907	359,606	65,301
78										
79	ADMINISTRATIVE - OFFICES									
80	Audit/Acct. Fees	910	901	13,025	10,000	1,471	8,529	40,000	16,307	23,693
81	Subscriptions	-	171	647	500	-	500	2,000	818	1,182
82	Office Sundries	8,164	4,355	13,187	7,000	5,770	1,230	28,000	31,496	(3,496)
83	Office Equipment Leases	36,592	44,816	25,726	40,000	43,588	(3,588)	160,000	150,722	9,278
84	Equipment Maintenance & Rep	3,628	3,575	5,919	8,000	6,270	1,730	32,000	25,392	6,608
85	Contributions	-	-	283	500	500	-	2,000	283	1,717
86	Research Material & Data	-	-	-	2,000	2,000	-	8,000	-	8,000
87	Dues Implementation	-	-	-	600	600	-	2,400	-	2,400
88	Computer Database Services	681	2,480	777	10,000	777	9,223	40,000	4,918	35,082

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SEIU Local 521
Financial Statement
For the month of June 2007

	B	J	M	P	R	S	T	AQ	AR	AS
		Mar	Apr	May		Jun				
		Actual	Actual	Actual	Budget	Actual	better/worse	Budget	Actual	better/worse
99 Miscellaneous			750		1,000		1,000	4,000	750	3,250
99 Total Admin - Offices		50,195	63,051	59,564	79,600	57,876	21,724	318,400	230,687	87,713
92 COMMUNICATIONS										
93 Printing		12,838	11,799	7,881	8,000	11,180	(3,180)	32,000	43,677	(11,677)
94 Paper		2,445	1,244	2,404	4,000	3,809	391	18,000	9,702	6,298
95 Website/Station/communication		719	799	453	1,500	310	1,190	6,000	2,281	3,719
96 Telephone & Internet		13,223	11,744	13,188	18,000	18,048	(48)	72,000	56,203	15,797
97 Postage		7,775	3,484	7,296	6,000	2,642	3,358	24,000	21,196	2,804
98 Professional Fees/Translations			55	120	1,000	195	805	4,000	370	3,630
99 Total Communications		36,998	29,125	31,342	38,500	35,964	2,536	154,000	133,429	20,571
101 CONFERENCES/MILEAGE										
102 Staff-Misc. Conf/Seminar					2,000	175	1,825	8,000	175	7,825
103 Exec. Board-Conferences					1,000		1,000	4,000	-	4,000
104 International Convention										
105 Industries & Members Conferences				1,500	1,000	95	905	4,000	1,595	2,405
106 Misc. Members-Reimbursed					500	604	(104)	2,000	804	1,396
107 Total Conferences/Mileage				1,500	4,500	874	3,626	18,000	2,374	15,626
109 STAFF MEETING & TRAINING										
110 Director Training				1,845	2,000		2,000	8,000	1,845	6,155
111 Staff - representation & political		4,360	7,456	682	10,000		10,000	40,000	12,478	27,522
112 Clerical Staff			1,392	259	800	323	477	3,200	1,975	1,225
113 Executive Staff		2,742		886	800	1,030	(230)	3,200	4,657	(1,457)
114 Tuition Reim -Internal Organizers					500		500	2,000	-	2,000
115 Tuition Reim -OPEIU					500		500	2,000	-	2,000
116 Total Staff Training		7,102	8,848	3,652	14,600	1,354	13,246	58,400	20,955	37,445
118 EDUCATION & TRAINING										
119 Steward & Chief Steward Training					300		300	1,200	-	1,200
120 Executive Board					500		500	2,000	-	2,000
121 Education & Training Committee Meeting & Materials					4,000	29	3,971	16,000	29	15,971
122 Industry Training Events					2,000		2,000	8,000	-	8,000

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93 Priority	12,638	11,799	7,861	8,000	11,760	(3,160)	32,000	43,871	(11,871)
94 Paper	2,445	1,244	2,404	4,000	3,809	391	16,000	9,702	6,298
95 Website/Station/communication	719	799	453	1,500	310	1,190	6,000	2,281	3,719
96 Telephone & Internet	13,223	11,744	13,188	18,000	18,048	(48)	72,000	56,203	15,797
97 Postage	7,775	3,454	7,296	6,000	2,642	3,358	24,000	21,196	2,804
98 Professional Fees/Translations		55	120	1,000	195	805	4,000	370	3,630
99 Total Communications	36,998	29,125	31,342	38,500	35,964	2,536	154,000	133,429	20,571
100									
101 CONFERENCES/MILEAGE									
102 Staff-Misc. Conf/Seminar				2,000	175	1,825	8,000	175	7,825
103 Exec. Board-Conferences				1,000		1,000	4,000	-	4,000
104 International Convention									
105 Industries & Members Conferences			1,500	1,000	35	965	4,000	1,595	2,405
106 Misc. Members-Reimbursed				500	604	(104)	2,000	604	1,396
107 Total Conferences/Mileage	-	-	1,500	4,500	874	3,626	18,000	2,374	15,626
108									
109 STAFF MEETING & TRAINING									
110 Director Training			1,845	2,000		2,000	8,000	1,845	6,155
111 Staff - representation & political	4,360	7,456	862	10,000		10,000	40,000	12,478	27,522
112 Clerical Staff		1,392	259	800	323	477	3,200	1,975	1,226
113 Executive Staff	2,742		886	800	1,030	(230)	3,200	4,657	(1,457)
114 Tuition Reim-Internal Organizers				500		500	2,000	-	2,000
115 Tuition Reim-OPEIU				500		500	2,000	-	2,000
116 Total Staff Training	7,102	8,848	3,652	14,600	1,354	13,246	58,400	20,955	37,446
117									
118 EDUCATION & TRAINING									
119 Steward & Chief Steward Training				300		300	1,200	-	1,200
120 Executive Board				500		500	2,000	-	2,000
121 Education & Training Committee Meeting & Materials				4,000	29	3,971	16,000	29	15,971
122 Industry Training Events				2,000		2,000	8,000	-	8,000
123 Total Education & Training	-	-	-	6,800	29	6,771	27,200	29	27,171
124									
125 POLITICAL/SOCIAL INVOLVEMENT									
126 Candidates Account (\$0.10 per	7,930	9,412	9,579	8,000	9,902	(3,902)	24,000	36,823	(12,823)
127 Issues Account									
128 Legal				4,000		4,000	16,000	-	16,000
129 Committee Meetings	91	86	88	300	1,298	(998)	1,200	1,542	(342)
130 Conferences				2,000		2,000	8,000	-	8,000
131 Electoral Staff/ Activity				300		300	1,200	-	1,200
132 Polls & Surveys				500		500	2,000	-	2,000

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SEIU Local 521
Financial Statement
For the month of June 2007

	B	M	P	R	S	T	AQ	AR	AS
	Mar	Apr	May		Jun		YTD - Four months		
	Actual	Actual	Actual	Budget	Actual	better/worse	Budget	Actual	better/worse
133 Special Printing				200		200	800	-	800
134 Subscriptions				25		25	100	-	100
135 Total Political/Social Invol	8,021	9,498	9,647	13,325	11,199	2,126	53,300	38,365	14,935
136									
137 SOCIAL & ECONOMIC JUSTICE									
138 Committee Meetings			22	300	524	(224)	1,200	546	654
139 Conferences	778			300		300	1,200	778	422
140 Contributions/Solidarity	500			200	350	(150)	800	850	(50)
141 *** \$1.00 PER MEMBER	4,568	312	1,182	3,125		3,125	12,500	6,082	6,418
142 Total Social & Economic J	5,887	312	1,204	3,925	874	3,051	15,700	8,256	7,444
143									
144 MEMBER INVOLVEMENT									
145 Memorabilia/Give away Memos	927	20,716	17,280	5,000	8,235	(3,235)	20,000	47,157	(27,157)
146 Awards/Recognition	500			300		300	1,200	500	700
147 Planning & Event Prep				300		300	1,200	-	1,200
148 Ex Board / Advisory Board Reimbursement				500		500	2,000	-	2,000
149 Rally Rental & Bus		3,575	1,945	4,000	760	3,240	16,000	6,275	9,725
150 Member Reimbursement/Lost time		293	831	5,000		5,000	20,000	1,114	18,886
151 Transportation & Vehicle Exper	134			500		500	2,000	134	1,866
152 Total Member Involvement	1,661	24,569	20,056	15,600	8,995	6,605	62,400	55,181	7,219
153									
154 NEGOTIATIONS									
155 Printing Contracts	30,237			5,000		5,000	20,000	30,237	(10,237)
156 Meetings & Supplies	445	1,690	1,087	5,000	2,287	2,713	20,000	5,509	14,491
157 Negotiations Committee Food				5,000		5,000	20,000	-	20,000
158 Strike Preparations				1,000		1,000	4,000	-	4,000
159 Automatic Strike Fund Transfer (\$0.50 per member/month)				18,750		18,750	75,000	-	75,000
160 Total Negotiations	30,682	1,690	1,087	34,750	2,287	32,463	139,000	35,746	103,254
161									
162 MEETINGS & EVENTS									
163 Executive Board Meetings			108	2,000		2,000	8,000	108	7,892
164 Steward/Council meetings	294	99	5,484	4,500	4,961	(461)	18,000	10,839	7,161
165 S21 Party & other events	2,595	5,896	22,719	7,000	1,565	5,435	28,000	32,785	(4,785)

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SEIU Local 521
Financial Statement
For the month of June 2007

	B	M	P	R	S	T	AG	AR	AS
	Mar	Apr	May	Jun	Jun		YTD - Four months		
	Actual	Actual	Actual	Budget	Actual	better/worse	Budget	Actual	better/worse
133 Special Printing				200		200	800	-	800
134 Subscriptions				25		25	100	-	100
135 Total Political/Social Invol	8,021	9,498	9,847	13,325	11,199	2,126	63,300	38,366	14,936
136									
137 SOCIAL & ECONOMIC JUSTICE									
138 Committee Meetings			22	300	524	(224)	1,200	546	654
139 Conferences	778			300		300	1,200	778	422
140 Contributions/Solidarity	500			200	350	(150)	800	850	(50)
141 *** \$1.00 PER MEMBER	4,586	312	1,182	3,125		3,125	12,500	6,082	6,418
142 Total Social & Economic J	6,867	312	1,204	3,925	874	3,051	15,700	8,256	7,444
143									
144 MEMBER INVOLVEMENT									
145 Memorabilia/Give away Membe	927	20,716	17,280	5,000	6,235	(3,235)	20,000	47,157	(27,157)
146 Awards/Recognition	500			300		300	1,200	500	700
147 Planning & Event Prep				300		300	1,200	-	1,200
148 Ex Board / Advisory Board Reimbursement				500		500	2,000	-	2,000
149 Rally Rental & Bus		3,570	1,945	4,000	760	3,240	16,000	6,275	9,725
150 Member Reimbursement/Lost time		283	831	5,000		5,000	20,000	1,114	18,886
151 Transportation & Vehicle Exper	134			500		500	2,000	134	1,866
152 Total Member Involvement	1,561	24,569	20,056	15,600	8,995	6,605	62,400	56,181	7,219
153									
154 NEGOTIATIONS									
155 Printing Contracts	30,237			5,000		5,000	20,000	30,237	(10,237)
156 Meetings & Supplies	445	1,690	1,087	5,000	2,287	2,713	20,000	5,509	14,491
157 Negotiations Committee Food				5,000		5,000	20,000	-	20,000
158 Strike Preparations				1,000		1,000	4,000	-	4,000
159 Automatic Strike Fund Transfer (\$0.50 per member/month)				18,750		18,750	75,000	-	75,000
160 Total Negotiations	30,682	1,690	1,087	34,750	2,287	32,463	139,000	35,746	103,254
161									
162 MEETINGS & EVENTS									
163 Executive Board Meetings			108	2,000		2,000	8,000	108	7,892
164 Steward/Council meetings	294	99	5,484	4,500	4,961	(461)	18,000	10,839	7,161
165 521 Party & other events	2,566	5,386	22,719	7,000	1,585	5,435	28,000	32,785	(4,785)

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SEIU Local 521
Financial Statement
For the month of June 2007

B	Mar	M Apr	P May	R	S Jun	T	AG	AR	AS
	Actual	Actual	Actual	Budget	Actual	better/worse	Budget	Actual	better/worse
170 REPRESENTATIVE DUES									
171 SEIU \$7.85 ea	571,918	386,333	397,907	430,848	412,365	18,482	1,723,392	1,768,523	(45,131)
172 SEIU Unity Fund \$5.00ea	347,500	238,740	247,290	266,200	254,750	11,450	1,064,800	1,088,260	(23,460)
173 SEIU Retirees \$1.00ea	-	-	-	60	-	60	240	-	240
174 SEIU Associate Members-1.00	-	-	-	12	-	12	48	-	48
175 SEIU State Council-SC \$3ea	197,088	126,638	130,547	142,490	157,157	(14,667)	569,956	611,433	(41,474)
176 So Bay CLC \$0.55ea	20,696	11,230	11,172	12,100	16,311	(4,211)	48,400	59,611	(11,211)
177 SMCO CLC \$0.60ea	4,965	2,571	2,440	2,838	2,629	209	11,352	12,605	(1,253)
178 Fresno CLC \$0.35ea	510	1,615	1,950	2,800	2,237	564	11,200	6,315	4,885
179 Bakersfield CLC \$0.25ea	-	1,585	1,753	1,625	1,854	(229)	6,500	5,193	1,308
180 Monterey & Santa Cruz LC \$0.4	1,680	2,646	3,605	3,300	3,600	(300)	13,200	11,733	1,467
181 CA Labor Fed 50% x .47ea	13,261	8,301	9,167	9,048	9,501	(453)	36,190	40,829	(4,639)
182 Building Trades-SMCO	250	250	250	250	275	(25)	1,000	1,025	(25)
183 Total Representative Dues	1,158,271	780,517	806,081	871,570	860,678	10,892	3,486,280	3,605,547	(119,266)
184									
185 TOTAL EXPENSES	2,584,643	2,280,894	2,112,499	2,390,457	2,216,213	174,243	7,824,343	7,758,314	166,028
186									
187 TOTAL INCOME LESS TOTAL	(642,897)	(263,919)	568,817	(2,500)	(21,997)	(19,498)	(10,000)	(388,996)	(378,996)
188									
189 VOLUNTARY TRANSFERS									
190 Building Funds	-	-	-	-	-	-	-	-	-
191 Automatic Legal Defense Fund	-	-	-	9,375	-	-	37,500	37,500	-
192 Strike Fund	-	-	-	-	-	-	-	-	-
193 Total Transfers	9,375	9,375	9,375	9,375	9,375	-	37,500	37,500	-
194 TOTAL INCOME LESS EXPEN	(652,272)	(293,294)	580,442	(11,875)	(31,372)	(19,498)	(47,600)	(426,496)	(378,996)

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174 SEIU Associate Members-1.00	-	-	-	12	-	12	48	-	48
175 SEIU State Council-\$0.53ea	197,089	126,639	130,547	142,430	157,157	(14,667)	569,958	611,433	(41,474)
176 So Bay CLC \$0.55ea	20,896	11,230	11,172	12,130	16,311	(4,211)	48,400	59,611	(11,211)
177 SMCO CLC \$0.60ea	4,965	2,571	2,440	2,838	2,629	209	11,352	12,605	(1,253)
178 Fresno CLC \$0.35ea	510	1,619	1,950	2,830	2,237	564	11,200	6,315	4,885
179 Bakersfield CLC \$0.25ea	-	1,585	1,753	1,625	1,854	(229)	6,500	5,193	1,306
180 Monterey & Santa Cruz LC \$0.5	1,880	2,648	3,605	3,330	3,600	(300)	13,200	11,733	1,467
181 CA Labor Fed 50% x .47ea	13,261	8,901	9,167	9,048	9,501	(453)	36,190	40,829	(4,639)
182 Building Trades-SMCO	250	250	250	250	275	(25)	1,000	1,025	(25)
183 Total Representative Dues	1,158,271	780,517	806,081	871,570	860,678	10,892	3,486,280	3,605,547	(119,266)
184									
185 TOTAL EXPENSES	2,584,663	2,280,894	2,112,499	2,390,457	2,216,213	174,243	7,924,343	7,756,314	168,028
186									
187 TOTAL INCOME LESS TOTAL	(642,897)	(283,919)	569,817	(2,500)	(21,997)	(19,498)	(10,000)	(388,996)	(378,998)
188									
189 VOLUNTARY TRANSFERS									
190 Building Funds									
191 Automatic Legal Defense Fund				9,375			37,500	37,500	-
192 Strike Fund									
193 Total Transfers	9,375	9,375	9,375	9,375	9,375		37,500	37,500	-
194 TOTAL INCOME LESS EXPENSES	(652,272)	(293,294)	560,442	(11,875)	(31,372)	(19,498)	(47,500)	(426,496)	(378,998)

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SEIU Local 521
Financial Statement
For the month of August 2007

B	J Mar	M Apr	P May	S Jun	V Jul	X Aug	YTD - 6 months	AR	AS
	Actual	Actual	Actual	Actual	Actual	Budget	Actual	Budget	Actual
2									
3 TOTAL DUES RECEIPTS	1,937,972	1,950,196	2,061,404	2,192,557	2,224,147	2,376,957	2,412,425	35,485	14,261,744
4 OTHER INCOME									
5 Interest & Dividends	-	6,158	7,801	6,689	7,707	2,400	10,529	6,129	14,400
6 SMH-SS Administrative Reimb	-	25,300	-	-	-	5,000	-	(5,000)	30,000
7 Sublease Rent	3,311	3,311	3,311	4,025	3,407	3,600	3,636	(64)	21,600
8 Misc Income	383	2,308	-	47	234	-	15	15	2,988
9 Total Misc Income	3,694	36,777	10,912	11,659	11,457	11,000	14,081	3,081	66,000
10									
11 TOTAL GENERAL FUND INC	1,941,666	1,996,975	2,072,316	2,194,216	2,235,604	2,387,957	2,426,506	38,568	14,327,744
12									
13 GENERAL FUND EXPENSES									
14									
15 ORGANIZING OFFSET	301,377	301,377	301,377	301,677	301,377	301,677	301,677	(6)	1,806,463
16									
17 SALARIES									
18 Administrative	20,292	24,472	34,472	34,472	34,472	37,345	50,267	(12,922)	224,089
19 Admin Support	15,732	18,304	32,391	32,284	32,224	37,674	54,556	(16,882)	226,041
20 Directors	63,406	65,826	65,561	71,083	70,314	93,895	105,810	(12,914)	503,376
21 Internal Organizers/Research	179,496	207,013	218,322	248,018	268,140	252,575	413,442	(150,874)	1,515,452
22 Clerical	68,721	67,065	54,179	55,439	66,802	55,579	97,339	(13,757)	411,472
23 Facilities	2,059	3,321	3,080	3,382	3,200	3,337	4,878	(1,541)	20,019
24 Data Base Services	17,192	21,395	22,839	23,847	23,361	23,217	38,212	(12,995)	139,299
25 Temp. Internal Organizers/Res	2,869	3,440	5,190	2,964	9,860	5,000	2,615	2,385	30,000
26 Temp. Clerical/Support	616	845	4,275	5,742	9,400	3,000	5,693	(2,693)	18,000
27 Vacation & Comp Time	5,611	655	5,067	5,921	4,294	25,331	13,090	12,241	151,686
28 Total Salaries	375,947	422,143	445,146	483,091	606,077	539,953	774,211	(234,258)	3,239,716
29 PAYROLL RELATED EXPENSES									
30 Pension	102,326	26,795	69,008	81,103	60,618	70,927	95,649	(25,022)	425,582
31 Payroll Taxes Expenses	30,413	67,561	26,190	29,002	26,278	50,662	52,793	(2,131)	303,973
32 Travel Staff Admin	981	3,012	5,977	434	3,564	500	6,410	(4,910)	6,000
33 Travel Staff Internal Organizer	5,977	9,614	3,634	1,755	6,336	3,000	3,757	(757)	19,000
34 Mileage/Trns Reimb-Admin & C	2,206	1,049	909	3,639	3,084	10,392	2,164	8,228	62,352
35 Mileage/Trns Reimb-Internal O	15,962	17,563	17,106	19,717	22,226	21,475	19,245	2,227	128,850
36 Telephone Reimbursement	3,040	2,268	2,431	2,467	4,067	7,500	4,349	3,151	45,000

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7 Sublease Rent	3,311	3,311	3,311	4,639	3,437	3,530	3,233	(64)	21,630	21,552	(48)
8 Misc Income	383	3,308	-	47	234	-	15	15	-	2,896	2,986
9 Total Misc Income	3,694	36,777	10,912	11,659	11,457	11,000	14,081	3,081	84,000	88,580	22,580
10											
11 TOTAL GENERAL FUND INC	1,941,666	1,996,975	2,672,316	2,194,216	2,238,894	2,387,957	2,426,506	38,548	14,327,744	13,467,283	(860,461)
12											
13 GENERAL FUND EXPENSES											
14											
15 ORGANIZING OFFSET	301,077	301,077	301,077	301,077	301,077	301,077	301,077	(6)	1,806,465	1,836,493	1
16											
17 SALARIES											
18											
19 Administrative	29,290	34,472	34,472	34,472	34,472	37,345	50,267	(12,922)	224,096	217,446	6,651
20 Admin Support	15,732	19,304	32,391	32,284	32,224	37,674	54,659	(16,982)	228,041	185,471	40,571
21 Directors	63,496	65,328	65,541	71,083	70,314	83,590	105,810	(22,216)	503,376	442,094	61,282
22 Internal Organizers/Research	179,406	207,213	218,022	248,019	258,140	252,675	413,449	(150,874)	1,815,452	1,624,142	(8,000)
23 Clerical	68,721	67,266	54,176	55,439	56,802	56,679	87,339	(15,731)	411,472	393,544	27,928
24 Facilities	3,069	3,321	3,080	3,362	3,203	3,337	4,875	(1,541)	20,019	20,513	(494)
25 Data Base Services	17,152	21,392	22,836	23,847	23,361	23,217	36,212	(12,955)	139,296	144,856	(5,560)
26 Temp. Internal Organizers/Res	2,889	3,440	5,190	2,664	6,863	6,000	2,615	2,355	30,000	26,951	3,049
27 Temp. Clerical/Support	915	845	4,275	5,742	9,402	3,000	5,693	(2,693)	18,000	26,074	(8,074)
28 Vacation & Comp Time	5,611	669	5,067	5,621	4,264	26,331	13,090	12,241	151,696	34,640	117,347
29 Total Salaries	375,947	422,143	445,146	483,091	506,077	539,953	774,211	(234,258)	3,239,716	3,006,614	233,101
30 PAYROLL RELATED EXPENSES											
31 Pension	102,326	28,766	58,808	61,103	60,816	76,927	95,649	(28,022)	425,532	456,396	17,194
32 Payroll Taxes Expenses	30,412	67,561	28,190	29,002	29,278	50,582	52,793	(2,211)	303,073	225,236	78,737
33 Travel Staff Admin	951	3,012	5,877	434	3,564	1,500	6,410	(4,910)	6,000	20,249	(11,249)
34 Travel Staff Internal Organizer	5,977	6,614	3,834	1,766	6,336	3,000	3,767	(757)	16,000	36,073	(12,073)
35 Mileage/Ins. Reimb. Admin & C	2,209	1,049	509	3,693	3,084	10,382	2,164	6,226	62,352	12,854	49,498
36 Mileage/Ins. Reimb. Internal O	16,962	17,963	17,106	19,717	22,226	21,475	19,248	2,227	126,850	112,242	10,608
37 Telephone Reimbursement	3,040	2,298	2,431	2,467	4,085	7,500	4,349	3,151	45,000	18,680	26,340
38 Retiree Health Exp	3,410	7,969	2,334	3,236	7,046	5,751	6,669	(895)	34,203	30,603	3,600
39 Retiree Health Trust Fund						10,400	10,400	-	62,400	62,400	-
40 Benefits Health, Dental, Vision	64,218	188,516	111,060	114,959	144,601	153,719	99,661	74,057	982,306	742,947	239,359
41 Workers Comp Insurance	23,737	7,613	7,613	12,613	7,613	20,846	7,613	13,056	124,190	66,802	57,388
42 Recruiting exp	900	1,364	1,331	1,175	1,271	1,000	1,601	(501)	6,000	7,592	(1,592)
43 Vacancy Rate (saving)						(86,182)	(86,182)	(529,095)	-	(529,095)	-
44 Total Payroll Related Expense	293,572	336,154	247,127	260,491	299,087	278,790	301,414	(22,624)	1,672,741	1,737,815	(65,074)
45 Total Salaries & Payroll Expense	669,519	758,297	692,272	743,582	805,164	818,743	1,075,625	(256,882)	4,912,457	4,744,429	168,028
46											

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SEIU Local 521
Financial Statement
For the month of August 2007

	B	J	M	P	S	V	X	Y	Z	AG	AR	AS
		Mar	Apr	May	Jun	Jul	Aug			YTD - Six months		
		Actual	Actual	Actual	Actual	Actual	Budget	Actual	better/worse	Budget	Actual	better/worse
46 MISCELLANEOUS												
49 Agency Fee/Assoc. Exp.							11,000			66,000	66,000	-
50 Capital Fund Expense		1,000	1,000	1,000	1,000	1,000	1,000	1,000		6,000	6,000	-
51 Admin exp share w chapter		375	40	302			1,000			6,000	717	5,283
52 Free life insurance to members (SCR, MRY &			1,200	2,494	1,227	1,026	6,900	1,227	5,673	40,800	7,135	33,665
53 Chapter Fund Reimbursement		3,685	3,074	3,119	3,693	4,249	4,000	4,191	(191)	24,000	22,210	1,790
54 Dodge Scholarship		1,500	1,500	1,500	1,500	1,500	1,500	1,500		6,000	6,000	-
55 Good & Welfare							3,500	262	3,238	21,000	262	21,338
56 UHW & L 877 ADMIN EXPEN		181,338	189,949	14,358	39,412	167,420		21,011	(21,011)		613,697	(613,667)
57 Hanford - Shawhan Expenses						10,000		10,000	(10,000)		20,000	(20,000)
58 Ex-Board Stipend						2,200		2,200	(2,200)		4,400	(4,400)
59 Total Miscellaneous		199,198	207,663	33,732	58,032	198,395	28,900	52,391	(23,491)	173,400	749,411	(576,011)
60												
61 ARBITRATIONS & LEGAL												
62 Arbitrations Fees		7,546	3,909	1,781	6,374	7,911	3,100	1,768	1,342	18,600	31,279	(12,679)
63 Retainer		13,262	8,965	21,791	11,237	27,134	21,740	20,117	1,623	130,440	102,637	27,803
64 Court Costs				1,215			3,300		3,300	19,800	1,215	18,585
65 Miscellaneous							500	500		3,000	-	3,000
66 Total Arbitrations & Legal		20,807	12,905	24,787	19,611	35,045	28,640	21,875	6,765	171,840	135,030	36,810
67												
68 FACILITIES												
69 Rent-SJC + 5355JC		32,716	37,573	37,731	37,643	37,597	34,922	32,627	2,095	209,532	216,187	(6,655)
70 Rent-RWC		6,114	6,114	6,130	6,130	6,130	6,114	6,230	(216)	36,684	36,946	(264)
71 Rent-Bakersfield apartment							1,625	1,625		9,150	-	9,150
72 Rent-Fresno		6,853	273	11,792	11,425	11,402	6,900	6,653	247	41,400	46,600	(7,200)
73 Rent-Santa Cruz Watsonville		750	7,383	7,326	7,329	7,329	7,333	7,329	4	43,996	37,450	6,546
74 Rent-Vsalia		2,167	661	925	661	661	700	900	(100)	4,200	6,065	(1,865)
75 Utilities		13,136	5,504	18,082	18,099	16,341	16,200	17,165	965	109,200	66,329	23,871
76 Kitchen Sundries		1,716	2550.03	2,153	2,325	(1,337)	3,500	5,432	(1,932)	21,000	12,843	8,157
77 Gen. Lab. Ins. & Property Tax		5,417	5,417	5,433	5,089	9,216	16,333	5,417	12,616	106,197	36,990	69,207
78 Building Maintenance/Security		7,948	11,783	8,008	17,551	13,286	9,000	14,082	(5,082)	54,000	73,257	(19,257)
79 Total Admin - Facilities		76,806	77,359	98,187	107,255	99,626	106,227	96,237	9,990	637,361	555,468	81,893
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51	Admin exp share w chapter	375	40	302				1,000		1,000	8,000	717	5,283
52	Free life insurance to members (SCR, MRY &		1,200	2,454	1,227	1,028	6,800	1,227	5,573	40,800	7,135	33,665	
53	Chapter Fund Reimbursement	3,688	3,074	3,119	3,863	4,249	4,000	4,191	19,111	24,000	22,210	1,790	
54	Dodge Scholarship	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	9,000	9,000	-	
55	Good & Welfare						3,600	262	3,338	21,600	262	21,338	
56	UHW & L'ETTY ADMIN EXPEN	181,938	189,940	14,358	39,412	107,420	-	21,611	121,809	-	813,887	(613,887)	
57	Harford - Shavian Expenses	-	-	-	-	10,000	-	10,000	10,000	-	26,000	(20,000)	
58	Ex-Board Spend	-	-	-	-	2,200	-	2,200	12,300	-	4,400	(4,400)	
59	Total Miscellaneous	199,198	207,663	33,732	58,032	198,230	28,900	52,391	(23,491)	173,400	749,411	(576,011)	
60													
61	ARBITRATIONS & LEGAL												
62	Arbitrations Fees	7,546	3,908	1,781	5,274	7,911	3,100	1,758	1,342	18,800	31,279	(12,979)	
63	Retainer	13,202	9,995	21,791	11,237	27,134	21,740	20,117	1,623	130,440	102,937	27,503	
64	Court Costs			1,215			3,300		3,300	19,800	1,215	18,585	
65	Miscellaneous						500		500	3,000	-	3,000	
66	Total Arbitrations & Legal	20,807	12,903	24,787	19,611	35,045	28,640	21,875	6,765	171,840	135,030	36,810	
67													
68	FACILITIES												
69	Rent-SJC + 535SJC	32,716	37,973	37,731	37,643	37,997	34,922	32,827	2,095	206,532	216,187	(9,655)	
70	Rent-RWC	6,114	6,114	6,130	6,130	6,130	6,114	6,333	216	36,834	36,846	(12)	
71	Rent-Bakersfield apartment						6,336		6,336	6,150	9,150		
72	Rent-Fresno	6,683	273	11,799	11,425	11,402	8,990	8,663	47	41,400	48,000	(7,200)	
73	Rent-Santa Cruz, Warsawville	780	7,383	7,326	7,329	7,329	7,333	7,329	47	43,996	37,450	6,546	
74	Rent-Vsaa	2,167	961	928	881	801	790	800	130	4,200	8,905	(1,065)	
75	Utilities	13,136	6,504	18,063	18,099	18,941	16,290	17,158	1,034	109,200	86,320	22,871	
76	Archon Sundries	1,718	2,556	2,153	2,328	1,837	3,590	5,432	11,932	21,000	12,843	8,157	
77	Gen. Lab. Ins. & Property Tax	6,417	6,417	8,433	8,099	6,216	13,333	8,417	12,815	138,197	38,090	69,207	
78	Building Maintenance/Security	7,948	11,783	8,608	17,521	13,266	9,000	14,682	15,382	54,000	73,257	(19,257)	
79	Total Admin - Facilities	76,806	77,359	88,187	107,255	98,626	106,227	96,237	9,990	637,361	656,468	81,893	
80													
81	ADMINISTRATIVE - OFFICES												
82	Audit/Act. Fees	910	901	13,026	1,471	1,146	10,000	13,750	12,752	90,000	31,204	28,796	
83	Subscriptions		721	647	-	115	500	226	274	3,000	1,159	1,841	
84	Office Sundries	8,184	4,355	13,187	5,773	6,429	7,000	7,008	181	42,000	47,933	(5,933)	
85	Office Equipment - Leases	38,592	44,916	25,706	43,598	32,548	40,000	28,626	11,104	240,000	212,196	27,804	
86	Equipment Maintenance & Rec	3,028	6,875	5,919	6,273	6,761	6,000	5,284	2,616	48,000	36,527	11,473	
87	Contributions			283		1,000	500		500	3,000	1,283	1,717	
88	Research Material & Data						2,000		2,000	12,000	-	12,000	
89	Dues Implementation						800		800	3,800	-	3,800	
90	Computer Database Services	581	2,482	777	777	324	10,000	52	9,946	80,000	6,204	64,796	
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SEIU Local 521
Financial Statement
For the month of August 2007

	B	J	M	P	S	V	X	Y	Z	AC	AR	AE
	Mar	Apr	May	Jun	Jul	Aug				YTD - Six months		
	Actual	Actual	Actual	Actual	Actual	Budget	Actual	better/worse	Budget	Actual	better/worse	
21 Miscellaneous		760				1,000	0	-1,000	6,000	750	5,250	
22 Total Admin - Offices	60,196	63,051	59,864	57,876	59,312	79,600	55,318	24,282	477,600	336,316	141,284	
24 COMMUNICATIONS												
25 Printing	12,836	11,799	7,861	11,180	3,342	6,000	1,787	4,213	48,000	48,808	(808)	
26 Paper	2,446	1,244	2,404	3,639	2,473	4,000	411	3,589	24,000	12,588	11,412	
27 Website/Station/communicator	719	769	483	310	261	500	303	197	6,000	2,935	3,065	
28 Telephone & Internet	13,223	11,744	13,188	18,049	11,967	16,000	12,207	3,793	108,000	60,387	47,613	
29 Postage	7,776	3,484	7,206	2,642	8,876	6,000	6,709	(6,709)	36,000	38,890	(2,890)	
100 Professional Fees/Translations		66	120	195		1,000	1,000		6,000	370	5,630	
101 Total Communications	36,990	29,125	31,342	35,964	26,818	38,500	23,416	15,084	231,000	183,843	47,157	
103 CONFERENCES/MILEAGE												
104 Staff-Misc. Conf/Seminar				175		2,000	678	1,322	12,000	750	11,250	
105 Exec. Board-Conferences						1,000		1,000	6,000		6,000	
106 International Convention												
107 Industries & Members Conferences			1,500	95		1,000		1,000	6,000	1,595	4,405	
108 Misc. Members-Reimbursed				604		500		500	3,000	604	2,396	
109 Total Conferences/Mileage			1,500	874		4,500	678	3,822	27,000	2,949	24,051	
111 STAFF MEETING & TRAINING												
112 Director Training			1,845			2,000		2,000	12,000	1,845	10,155	
113 Staff - representation & politica	4,360	7,458	862			10,000	5,078	4,922	50,000	17,858	32,142	
114 Clerical Staff		1,362	269	323	177	900	586	314	4,800	2,719	2,081	
115 Executive Staff	2,742		886	1,030		900		900	4,800	4,897	(97)	
116 Tutor Rem-Interna. Organizers						500		500	3,000		3,000	
117 Tutor Rem-OPEIU						500		500	3,000		3,000	
118 Total Staff Training	7,102	8,848	3,682	1,354	177	14,600	5,644	8,956	87,600	26,776	60,824	
119												
120 EDUCATION & TRAINING												
121 Steward & Chief Steward Training						300		300	1,800		1,800	
122 Executive Board						500		500	3,000		3,000	
123 Education & Training Committee Meeting & Materials				29		4,000		4,000	24,000	29	23,971	
124 Industry Training Events						2,000		2,000	12,000		12,000	
125 Total Education & Training				29		6,800		6,800	40,800	29	40,771	

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95 Printing	12,936	11,799	7,881	11,169	5,342	8,500	4,787	8,213	48,000	48,500	(500)
96 Paper	2,446	1,244	2,404	3,639	2,472	4,500	411	3,659	24,000	2,598	11,416
97 Website/Station/communicator	719	799	463	313	231	1,500	303	1,197	6,000	2,838	5,165
98 Telephone & Internet	13,223	11,744	13,148	18,048	11,957	15,000	12,207	5,793	106,000	66,387	27,933
99 Postage	7,775	3,484	7,296	2,642	8,876	6,000	8,759	(2,759)	36,000	38,590	(2,590)
100 Professional Fees/Translations		66	120	195		1,000		1,000	6,000	370	5,630
101 Total Communications	36,998	29,125	31,342	35,964	26,618	39,500	23,416	15,084	231,000	183,643	47,457
102 CONFERENCES/MILEAGE											
104 Staff-Misc Conf/Seminar				175		2,000	675	1,425	12,000	750	11,250
105 Exec Board-Conferences						1,000		1,000	6,000		5,000
106 International Convention											
107 Industries & Members Conferences			1,500	95		1,000		1,000	6,000	1,595	4,405
108 Misc Members-Reimbursed				604		500		500	3,000	804	2,396
109 Total Conferences/Mileage			1,600	874		4,500	575	3,925	27,000	2,949	24,051
110 STAFF MEETING & TRAINING											
112 Director Training			1,845			2,000		2,000	12,000	1,845	10,155
113 Staff - representation & politica	4,360	7,466	662			10,000	5,076	4,924	90,000	7,699	42,446
114 General Staff		1,392	259	323	177	800	566	232	4,800	2,719	2,081
116 Executive Staff	2,742		685	1,030		800		800	4,800	4,857	143
118 Tutor Rem-Interna. Organizers						500		500	3,000		3,000
119 Tutor Rem-OPEIU						500		500	3,000		3,000
120 Total Staff Training	7,102	8,848	3,652	1,354	177	14,800	5,644	8,956	87,600	26,776	60,825
121 EDUCATION & TRAINING											
121 Steward & Chief Steward Training						300		300	1,800		1,800
122 Executive Board						500		500	3,000		3,000
123 Education & Training Committee Meeting & Materials				29		4,000		4,000	24,000	29	23,971
124 Industry Training Events						2,000		2,000	12,000		12,000
125 Total Education & Training				29		6,800		6,800	40,800	29	40,771
126 POLITICAL/SOCIAL INVOLVEMENT											
128 Candidates Account: \$0.10 per	7,930	9,412	9,576	9,602	4,061	6,000	2,004	3,996	36,000	42,917	(5,917)
129 Issues Account							2,003	(2,003)		2,003	(2,003)
130 Legal						4,000		4,000	24,000		24,000
131 Committee Meetings	91	66	68	1,295		300	401	1,101	1,800	1,944	1,444
132 Conferences					509	2,000		2,000	12,000	509	11,491
133 Electoral Staff: Actvty						300		300	1,800		1,800
134 Polls & Surveys					247	500		500	3,000	247	2,753
135 Special Printing						200		200	1,200		1,200
136 Subscriptions						25		25	150		150

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SEIU Local 521
Financial Statement
For the month of August 2007

	B	J	M	P	S	V	X	Y	Z	AG	AR	AS
		Mar	Apr	May	Jun	Jul	Aug					
		Actual	Actual	Actual	Actual	Actual	Budget	Actual	better/worse	Budget	Actual	better/worse
137	Total Political/Social Invol	8,021	9,498	8,647	11,199	4,846	13,325	4,408	8,917	79,990	47,620	32,336
138												
139	SOCIAL & ECONOMIC JUSTICE											
140	Committee Meetings			22	524		300	250	(50)	1,800	304	666
141	Conferences	778					300	123	107	1,800	971	829
142	Contributions/Solidarity	500			350		300	300	(100)	1,200	1,150	50
143	*** \$1.00 PER MEMBER	4,588	312	1,182		2,467	3,125	6,844	(6,719)	18,750	17,413	1,337
144	Total Social & Economic	6,867	312	1,204	874	2,467	3,925	9,696	(6,771)	23,650	20,438	3,112
145												
146	MEMBER INVOLVEMENT											
147	Memorabilia/Give away Membs	927	20,716	17,280	9,295	21,247	5,000	52,260	(77,260)	30,000	150,895	(120,895)
148	Awards/Recognition	500					300		300	1,800	500	1,300
149	Planning & Event Prep						300		300	1,800	-	1,800
150	Ex Board / Advisory Board Reimbursement						500		500	3,000	-	3,000
151	Rail Rent & Bus		9,570	1,945	753		4,000	74	3,926	24,000	6,349	17,651
152	Member Reimbursement/Lost time		283	831		1,414	5,000	666	4,334	30,000	3,097	26,903
153	Transportation & Vehicle Expense	134					500		500	3,000	134	2,866
154	Total Member Involvement	1,561	24,569	20,056	8,995	22,661	15,600	62,903	(67,303)	93,600	160,745	(67,145)
155												
156	NEGOTIATIONS											
157	Printing Contracts	30,237				507	5,000	(447)	5,447	30,000	30,237	(267)
158	Meetings & Supplies	448	1,660	1,067	2,287	2,856	5,000	6,627	(1,627)	30,000	14,952	15,048
159	Negotiations Committee Food						5,000		5,000	30,000	-	30,000
160	Strike Preparations						1,000		1,000	6,000	-	6,000
161	Automatic Strike Fund Transfer (\$0.93 per member/mo)						16,750		16,750	112,500	-	112,500
162	Total Negotiations	30,685	1,660	1,067	2,287	3,163	34,750	6,081	28,669	208,500	44,989	163,511
163												
164	MEETINGS & EVENTS											
165	Executive Board Meetings			108		965	2,000	210	1,790	12,000	965	11,035
166	Steward/Council meetings	264	68	5,464	4,961	4,281	4,500	26	4,474	27,000	16,146	10,854
167	201 Party & other events	2,596	5,688	22,719	1,585		7,000	3,619	3,381	42,000	36,281	5,719
168	Advisory Board Meetings	15,570					10,000	2,791	7,209	60,000	18,331	41,669
169	Miscellaneous						200		200	1,200	-	1,200
170	Total Meetings & Events	18,490	5,985	28,311	6,526	4,948	23,700	6,513	17,187	142,200	70,740	71,460

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141	Conferences	778				300	193	107	1,800	971	828	
142	Contributions/Solidarity	500			350	200	300	(130)	1,200	1,190	60	
143	*** \$1.00 PER MEMBER	4,588	312	1,182		3,125	8,844	(6,719)	18,790	17,413	1,337	
144	Total Social & Economic	5,867	312	1,204	874	2,447	3,925	9,696	(5,771)	23,660	20,438	3,112
145												
146	MEMBER INVOLVEMENT											
147	Memorabilia/Give away Membr	927	20,716	17,260	6,235	21,247	5,000	62,260	(77,260)	30,000	150,895	(120,965)
148	Awards/Recognition	500					300	300	1,800	500	1,300	
149	Planning & Event Prep						300	300	1,800	-	1,800	
150	Ex Board / Advisory Board Reimbursement						500	500	3,000	-	3,000	
151	Rail Rents & Bus		3,570	1,340	700		4,000	74	3,926	24,000	6,349	17,651
152	Member Reimbursement/Lost time		283	631		1,414	5,000	656	4,431	30,000	3,027	28,903
153	Transportation & Vehicle Exper	134					500	500	3,000	134	2,866	
154	Total Member Involvement	1,561	24,569	20,896	6,935	22,661	15,800	62,903	(67,303)	93,400	180,745	(67,145)
155												
156	NEGOTIATIONS											
157	Printing Contracts	30,237				907	5,000	(447)	5,447	30,000	30,237	(267)
158	Meetings & Supplies	446	1,560	1,387	2,297	2,856	5,000	6,627	(1,627)	30,000	14,692	18,308
159	Negotiations Committee Food						5,000	5,000	30,000	-	30,000	
160	Strike Preparations						1,000	1,000	6,000	-	6,000	
161	Automatic Strike Fund Transfer (\$0.50 per member/month)						16,750	16,750	112,500	-	112,500	
162	Total Negotiations	30,682	1,630	1,087	2,287	3,163	34,750	6,081	28,669	208,500	44,989	163,511
163												
164	MEE TINGS & EVENTS											
165	Executive Board Meetings			109		666	2,000	210	1,790	12,000	982	11,318
166	Steward/Council Meetings	204	69	5,484	4,951	4,281	4,500	26	4,474	27,000	16,146	11,854
167	ETI Party & other events	2,608	6,586	22,719	1,555		7,000	3,618	3,484	42,000	36,281	6,719
168	Advisory Board Meetings	18,870					10,000	2,751	7,249	60,000	18,331	41,669
169	Miscellaneous						200	200	1,200	-	1,200	
170	Total Meetings & Events	18,458	6,985	28,311	6,526	4,946	23,700	6,513	17,187	142,200	70,740	71,460
171												

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SEIU Local 521
Financial Statement
For the month of August 2007

B	J Mar	M Apr	P May	S Jun	V Jul	X Aug	Y Aug	Z	AC	AR YTD - Six months	AE
	Actual	Actual	Actual	Actual	Actual	Budget	Actual	better/worse	Budget	Actual	better/worse
2 REPRESENTATIVE DUES											
173 SEIU \$7.05 ea	571,918	386,333	307,907	412,369	424,540	430,848	417,300	13,546	2,685,096	2,610,393	(25,275)
174 SEIU Unity Fund \$5.00ea	347,500	239,740	247,290	254,760	268,260	266,200	263,365	2,835	1,697,200	1,618,035	(19,705)
175 SEIU Retirees \$1.00ea	-	-	-	-	-	80	602	(542)	360	602	(242)
176 SEIU Associate Members \$1.00	-	-	-	-	-	12	-	12	72	-	72
177 SEIU State Council \$2.52ea	167,066	126,639	130,547	157,167	139,968	142,490	148,237	(5,747)	854,936	899,855	(44,717)
178 So Bay CLC \$0.55ea	20,896	11,230	11,172	19,311	14,002	12,100	16,062	(3,952)	72,600	66,875	(17,375)
179 SMO CLC \$0.60ea	4,955	2,571	2,440	2,620	2,371	2,935	2,165	863	17,026	17,131	(103)
180 Fresno CLC \$0.35ea	510	1,619	1,950	2,237	1,967	2,800	2,195	802	10,500	10,490	5,320
181 Bakersfield CLC \$0.25ea	-	1,586	1,785	1,864	1,760	1,626	1,805	(153)	6,750	6,790	960
182 Monterey & Santa Cruz LC \$0	1,880	2,648	3,805	3,600	4,264	3,300	3,689	(389)	19,800	20,006	(206)
183 CA Labor Fed 50% X .47ea	13,261	9,901	9,187	9,501	9,930	9,046	9,720	(673)	54,285	60,379	(5,094)
184 Building Trades-SMCO	260	260	260	275	276	250	275	(25)	1,500	1,675	(75)
185 Total Representative Dues	1,166,271	780,517	806,081	860,678	864,274	871,570	865,710	5,860	5,229,421	5,335,631	(106,110)
186											
187 TOTAL EXPENSES	2,684,863	2,280,894	2,112,499	2,216,213	2,419,840	2,390,457	2,607,469	(217,013)	14,342,744	14,220,478	122,266
188											
189 TOTAL INCOME LESS TOTAL	(642,897)	(283,919)	559,817	(21,997)	(183,236)	(2,500)	(180,964)	(178,465)	(10,000)	(388,996)	(378,998)
190											
191 VOLUNTARY TRANSFERS											
192 Building Funds	-										
193 Automatic Legal Defense Fund						9,375			56,250	56,250	-
194 Strike Fund											
195 Total Transfers	9,375	9,375	9,375	9,375	6,376	9,375	9,375	-	56,250	56,250	-
196 TOTAL INCOME LESS EXPEN	(632,272)	(293,294)	550,442	(31,372)	(192,611)	(11,875)	(190,339)	(178,465)	(47,500)	(426,496)	(378,998)

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176	SEIU Associate Members-1 00	-	-	-	-	12	-	12	72	-	72	
177	SEIU State Council-52.53ea	167,089	126,836	130,547	157,157	136,936	142,493	148,237	(5,747)	854,836	899,856	(44,771)
178	Se Bay CLC \$0.65ea	20,908	11,230	11,172	19,311	14,002	12,130	16,062	(3,962)	72,830	86,875	(17,076)
179	SMCO CLC \$0.60ea	4,965	2,571	2,440	2,629	2,371	2,836	2,155	683	17,028	17,131	(103)
180	Fresno CLC \$0.35ea	510	1,619	1,900	2,237	1,907	2,800	2,198	602	16,900	10,490	6,320
181	Bakersfield CLC \$0.25ea	-	1,585	1,793	1,854	1,790	1,525	1,805	(153)	6,750	8,790	(960)
182	Monterey & Santa Cruz LC \$0	1,880	2,648	3,805	3,600	4,264	3,300	3,989	(689)	19,930	20,006	(206)
183	CA Labor Fed 50% X .47ea	13,261	8,901	8,167	9,501	9,810	9,043	9,720	(673)	54,295	60,379	(5,064)
184	Building Trades-SMCO	250	260	260	275	275	250	275	(25)	1,500	1,675	(175)
185	Total Representative Dues	1,158,271	780,517	806,881	860,678	864,274	871,570	865,710	5,860	5,229,421	5,335,631	(106,110)
186												
187	TOTAL EXPENSES	2,984,563	2,280,894	2,112,499	2,216,213	2,419,840	2,390,457	2,607,469	(217,013)	14,342,744	14,220,478	122,266
188												
189	TOTAL INCOME LESS TOTAL	(642,897)	(283,319)	959,817	(21,997)	(183,206)	(2,500)	(180,964)	(178,465)	(19,000)	(388,996)	(378,998)
190												
191	VOLUNTARY TRANSFERS											
192	Building Funds	-	-	-	-	-	-	-	-	-	-	-
193	Automatic Legal Defense Fund	-	-	-	-	-	9,375	-	-	50,250	50,250	-
194	Strike Fund	-	-	-	-	-	-	-	-	-	-	-
195	Total Transfers	9,375	9,375	9,375	9,375	9,375	9,375	9,375	-	50,250	50,250	-
196	TOTAL INCOME LESS EXPEI	(652,272)	(293,294)	950,442	(31,372)	(192,611)	(11,875)	(190,339)	(178,465)	(47,500)	(428,696)	(378,998)

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	B	J	M	P	S	F
		Mar	Apr	May	Jun	For the 1
1						
2						
3	TOTAL DUES RECEIPTS	Actual	Actual	Actual	Actual	
4	OTHER INCOME	1,937,972	1,950,196	2,681,404	2,182,567	
5	Interest & Dividends		6,196	7,601	6,986	
6	SMHSS Administrative Rair		25,000			
7	Sublease Rent	3,311	3,311	3,311	4,026	
8	Misc. Income	383	2,308		47	
9	Total Misc. Income	3,694	38,777	10,912	11,853	
10						
11	TOTAL GENERAL FUND IN	1,941,666	1,988,973	2,692,316	2,194,216	
12						
13	GENERAL FUND EXPENSES					
14						
15	ORGANIZING OFFSET	301,077	301,077	301,077	301,077	
16						
17	SALARIES	26,283	34,472	34,472	34,472	
18	Administrative	18,732	18,304	32,381	32,284	
19	Admin Support	63,496	66,828	66,641	71,063	
20	Directors	179,489	207,013	218,022	248,018	
21	Internal Operations/Research	58,721	67,086	54,179	55,438	
22	Chemical	2,689	3,321	3,680	3,362	
23	Facilities	17,162	21,396	22,689	23,047	
24	Data Base Services	2,888	3,440	5,180	2,064	
25	Temp. Internal Operations/R	915	646	4,276	5,742	
26	Temp. Chemical Support	5,611	606	6,067	6,921	
27	Vacation & Comp Time	378,947	422,143	448,146	483,091	
28	Total Salaries	102,326	26,766	58,808	61,103	
29	PAYROLL RELATED EXPENSES	30,413	57,561	28,180	29,002	
30	Pension	951	3,012	5,877	434	
31	Payroll Taxes-Admin	5,877	9,614	3,654	1,766	
32	Travel Staff-Internal Organiz	2,208	1,049	609	3,639	
33	Travel Staff-Internal Organiz	15,982	17,963	17,106	18,717	
34	Management. Rairmb.-Admin &	3,040	2,298	2,431	2,457	
35	Management. Rairmb.-Admin &	3,410	7,089	2,284	3,236	
36	Telephone Reimbursement					
37	Relates Health Exp					
38	Relates Health Exp					
39	Relates Health Exp					
40	Relates Health Exp					
41	Relates Health Exp					
42	Relates Health Exp					
43	Relates Health Exp					
44	Relates Health Exp					
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Financial Statement For the month of September 2007

M	P	S	Jd	V	Aug	AA	AB
Apr	May	Jun					Sep
Actual	Actual	Actual	Actual	Actual	Budget	Actual	
1,000	1,000	1,000	1,000	1,000	11,000	12,726	
40	302	1,227	1,026	1,227	1,000	1,000	
1,200	2,454	3,683	4,240	4,181	6,800	1,123	
3,074	3,119	1,500	1,500	1,500	4,000	1,500	
1,500	1,500	1,500	1,500	1,500	3,500	1,500	
188,848	14,956	38,412	187,400	21,011	10,000	175,580	
207,863	55,732	65,932	188,386	62,381	2,200	10,000	
3,908	1,781	8,374	7,811	1,758	3,400	8,835	
8,965	21,781	11,237	27,134	20,117	21,740	23,578	
13,906	34,787	18,811	36,045	21,878	28,440	33,491	
37,673	37,731	37,643	37,697	32,827	34,822	31,282	
6,114	6,130	6,130	6,130	6,330	6,114	6,330	
273	11,790	11,425	11,402	6,863	1,026	6,060	
7,363	7,329	7,329	7,329	7,329	7,333	7,330	
691	925	661	961	800	750	900	
5,504	18,083	18,089	15,341	17,186	18,200	14,581	
25,503	2,453	2,328	(1,357)	6,432	3,550	4,558	
5,417	5,433	8,089	9,216	5,417	16,033	5,314	
11,783	6,606	17,561	13,286	14,062	9,000	10,569	
77,388	94,787	187,356	89,526	84,237	104,237	83,828	
801	13,026	1,471	1,146	13,752	10,000	1,029	
171	647	-	115	226	804	209	
4,356	13,187	5,770	9,428	7,008	7,000	9,050	
44,816	23,729	43,586	32,548	28,688	40,000	31,215	
6,676	5,919	6,270	6,761	5,384	8,000	725	
2,482	777	777	324	62	10,000	5,553	
750	68,884	87,878	80,312	85,316	1,000	47,829	
63,081	68,884	87,878	80,312	85,316	78,648	47,829	

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B	J	M	P	S
	Mar	Apr	May	Jun
1				
2				
64 COMMUNICATIONS	Actual	Actual	Actual	Actual
65 Printing	12,636	11,799	7,681	11,160
66 Paper	2,445	1,244	2,404	3,608
67 Website/Station/Communicat	719	799	403	310
68 Telephone & Internet	13,223	11,744	13,165	16,046
69 Postage	7,776	3,484	7,290	2,642
100 Professional Fees/Translations		95	120	195
101 Total Communications	38,988	29,125	31,345	34,984
102				
103 CONFERENCES/MEETINGS				
104 Self-Misc. Conf/Seminars				175
105 Exec. Board-Conferences				
106 International Convention				
107 Industries & Members Conferences			1,500	95
108 Misc. Members-Reimbursed			1,600	604
109 Total Conferences/Meets				874
110				
111 STAFF MEETING & TRAINING				
112 Director Training			1,945	
113 Staff - representation & polit	4,390	7,466	682	323
114 Clerical Staff		1,392	259	1,030
115 Executive Staff	2,742		888	
116 Tuition Reim. Internal Organizers				
117 Tuition Reim.-Op-EdU				
118 Total Staff Training	7,132	8,848	3,692	1,354
119				
120 EDUCATION & TRAINING				
121 Steward & Chair Steward Training				
122 Executive Board				
123 Education & Training Committee Meeting & Materials				29
124 Industry Training Events				
125 Total Education & Traini				29
126				
127 POLITICAL/SOCIAL INVOLVEMENT				
128 Candidates Account (\$0.10 F	7,930	8,412	8,978	9,802
129 Issues Account				
130 Legal				
131 Committee Meetings	91	86	86	1,298
132 Conferences				
133 Episcopal Staff Activity				
134 Polls & Surveys				
135 Special Printing				
136 Subscriptions				
137 Total Political/Social Inv	8,021	8,498	9,647	11,100

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Financial Statement
month of September 2007

	V	Y	AA	AB	AC	AD	AE	AF
	Aug	Aug	Aug	Aug	Aug	Aug	Aug	Aug
Actual	Actual	Budget	Actual	Budget (variance)	Budget	Actual		
3,542	1,767	8,000	4,428	3,571	56,000	53,23		
2,473	411	4,000	1,607	2,393	25,000	14,19		
251	303	1,500	1,857	(387)	10,500	4,70		
11,857	12,207	18,000	8,544	8,456	128,000	89,87		
8,875	8,709	8,000	5,776	224	42,000	44,35		
		1,000	405	695	7,000	77		
58,888	23,416	38,500	23,528	14,972	289,400	207,17		
	575	2,000	680	1,320	14,000	1,48		
		1,000		1,000	7,000			
		1,000	27,301	(26,301)	7,000	26,68		
	575	800	27,981	(23,481)	3,500	40		
		4,500			51,000	38,53		
		2,000	1,865	112	14,000	2,73		
		10,000	6,285	3,714	70,000	23,64		
177	5,078	800	988	(188)	5,500	2,71		
	866	500		500	5,000	5,82		
		500		500	3,500			
		800		800	103,200	34,91		
177	9,544	14,500	8,143	6,457				
		300		300	2,100			
		500	3,802	(3,302)	2,500	3,85		
		4,000		4,000	28,000	25		
		2,000	3,882	2,503	47,000	3,88		
		8,000						
4,001	2,004	6,000	2,038	3,962	42,000	44,99		
	2,003		2,039	(2,039)		4,04		
		4,000		4,000	28,000			
509	401	300		300	2,100	1,94		
		2,000		2,000	16,000	505		
		300		300	2,100			
247		500		500	3,500	247		
		200		200	1,400			
		25		25	175			
4,848	4,408	13,125	4,078	8,248	83,276	81,69		

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AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ
	Sup								
Budget	Actual	budget(wrong)	Budget	Actual	budget(wrong)				
300		300	2,100	804	1,198				
300		300	2,100	871	1,129				
200		200	1,400	1,160	260				
3,125	3,246	(121)	21,875	20,650	(1,216)				
3,825	3,246	579	27,475	22,894	2,791				
5,000	4,371	629	35,000	108,030	(120,030)				
300		300	2,100	800	1,300				
300		300	2,100		2,100				
500		500	3,500	7,383	3,883				
4,000	1,034	2,966	28,000	20,617	30,383				
5,000	1,218	3,782	35,000	4,315	30,685				
500		500	3,500	134	3,366				
16,600	6,433	6,977	160,000	187,346	(26,166)				
5,000		5,000	35,000	30,297	4,703				
5,000	11,624	(6,624)	35,000	26,815	8,185				
5,000		5,000	35,000		35,000				
1,000		1,000	7,000		7,000				
16,750		16,750	131,250		131,250				
34,750	11,834	22,916	243,250	88,813	154,437				
2,000		2,000	14,000	882	13,018				
4,500		4,500	31,500	15,186	16,314				
7,000		7,000	49,000	26,281	12,719				
10,000		10,000	70,000	16,331	51,669				
200	(1)	201	1,400	(1)	1,401				
23,700	(1)	23,701	185,800	76,708	84,161				

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172 REPRESENTATIVE DUES	Actual	Actual	Actual	Actual
173 SEU \$7.66 ea	571,916	346,333	387,007	412,366
174 SEU Unity Fund \$5.00ea	347,500	236,740	247,280	254,750
175 SEU Refines \$1.00ea				
176 SEU Associate Members-1.1				
177 SEU State Council-42.50ea	187,088	126,639	130,547	157,157
178 So Bay CLC \$0.50ea	20,888	11,230	11,172	16,311
179 SMOO CLC \$0.50ea	4,985	2,571	2,440	2,628
180 Fresno CLC \$0.30ea	510	1,619	1,950	2,237
181 Beaumont CLC \$0.25ea	1,580	1,585	1,753	1,654
182 Monterey & Santa Cruz LC \$	1,580	2,848	3,605	3,600
183 CA Labor Fed 50% X 4/7ea	13,261	6,901	9,167	9,501
184 Building Trades-SMOO	250	250	250	275
185 Total Representative Du	1,198,271	788,517	884,081	884,678
186				
187 TOTAL EXPENSES	2,084,863	2,288,514	2,112,488	2,216,213
188				
189 TOTAL INCOME LESS TOT	(642,877)	(283,919)	889,817	(21,987)
190				
191 VOLUNTARY TRANSFERS				
192 Building Funds				
193 Automatic Legal Defense Fu				
194 State Fund	9,375	9,375	9,375	9,375
195 Total Transfers	(651,272)	(283,294)	606,442	(31,373)
196 TOTAL INCOME LESS EXP				

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Financial Statement

Month of September 2007

	Jul	Aug	MA	AB	AC	AQ	YTD - Seven	AR
Actual	424,540	417,300	430,846	498,682	(97,704)	\$,015,098	3,106,9	
Budget	265,260	263,365	268,200	312,188	(45,806)	1,065,100	1,928,1	
Variance	159,280	153,935	162,646	186,494	(51,898)	1,950,000	1,178,8	
Actual	139,886	148,237	142,400	164,040	(11,661)	587,427	1,059,8	
Budget	14,002	16,062	12,100	12,164	(64)	64,700	101,8	
Variance	125,884	132,175	130,300	151,876	(11,617)	522,727	958,0	
Actual	2,371	2,156	2,658	2,568	270	19,885	18,8	
Budget	1,987	2,198	2,800	5,108	(2,309)	19,800	16,8	
Variance	384	(42)	(142)	(2,540)	579	1,085	2,0	
Actual	1,780	1,808	1,825	2,042	(417)	11,376	10,8	
Budget	4,284	3,968	3,300	3,823	(523)	23,100	23,8	
Variance	(2,504)	(2,160)	(1,475)	(1,781)	1,107	(11,724)	(13,0)	
Actual	9,830	9,720	9,048	13,191	(4,143)	63,333	73,5	
Budget	275	275	250	275	(25)	1,750	1,8	
Variance	9,555	9,445	8,798	12,916	(4,118)	61,583	71,7	
Actual	864,274	868,710	871,878	1,063,898	(192,020)	4,108,991	8,238,4	
Budget	2,618,848	2,607,488	2,398,487	2,912,088	(221,989)	16,733,281	19,832,8	
Variance	(1,754,574)	(1,738,778)	(1,526,609)	(1,848,190)	71,969	(12,624,290)	(11,594,4)	
Actual	9,375	9,375	9,375	9,375		65,625	66,6	
Budget	(102,811)	(180,238)	(11,878)	264,218	278,142	61,526	85,8	
Variance	112,186	189,613	21,253	(254,843)	(268,767)	(4,901)	(19,2)	

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SEIU Local 521
Financial Statement - For the month of November 2007

	Mar	Apr	May	Jun	Jul	Aug	SEP	OCT	NOV	YTD - Nine months	Actual	Budget	Actual	Budget	Actual	Budget
1																
2																
3	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget	Actual
4	2,837,972	2,855,792	2,841,404	2,822,817	2,824,147	2,812,428	2,847,833	2,825,316	2,878,987	2,869,280	21,867	21,867	21,867	21,867	21,867	21,867
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SEIU Local 511
Financial Statement - For the month of November 2007

	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100	101	102	103	104	105	106	107	108	109	110	111	112	113	114	115	116	117	118	119	120	121	122	123	124	125	126	127	128	129	130	131	132	133	134	135	136	137	138	139	140	141	142	143	144	145	146	147	148	149	150	151	152	153	154	155	156	157	158	159	160	161	162	163	164	165	166	167	168	169	170	171	172	173	174	175	176	177	178	179	180	181	182	183	184	185	186	187	188	189	190	191	192	193	194	195	196	197	198	199	200	201	202	203	204	205	206	207	208	209	210	211	212	213	214	215	216	217	218	219	220	221	222	223	224	225	226	227	228	229	230	231	232	233	234	235	236	237	238	239	240	241	242	243	244	245	246	247	248	249	250	251	252	253	254	255	256	257	258	259	260	261	262	263	264	265	266	267	268	269	270	271	272	273	274	275	276	277	278	279	280	281	282	283	284	285	286	287	288	289	290	291	292	293	294	295	296	297	298	299	300	301	302	303	304	305	306	307	308	309	310	311	312	313	314	315	316	317	318	319	320	321	322	323	324	325	326	327	328	329	330	331	332	333	334	335	336	337	338	339	340	341	342	343	344	345	346	347	348	349	350	351	352	353	354	355	356	357	358	359	360	361	362	363	364	365	366	367	368	369	370	371	372	373	374	375	376	377	378	379	380	381	382	383	384	385	386	387	388	389	390	391	392	393	394	395	396	397	398	399	400	401	402	403	404	405	406	407	408	409	410	411	412	413	414	415	416	417	418	419	420	421	422	423	424	425	426	427	428	429	430	431	432	433	434	435	436	437	438	439	440	441	442	443	444	445	446	447	448	449	450	451	452	453	454	455	456	457	458	459	460	461	462	463	464	465	466	467	468	469	470	471	472	473	474	475	476	477	478	479	480	481	482	483	484	485	486	487	488	489	490	491	492	493	494	495	496	497	498	499	500	501	502	503	504	505	506	507	508	509	510	511	512	513	514	515	516	517	518	519	520	521	522	523	524	525	526	527	528	529	530	531	532	533	534	535	536	537	538	539	540	541	542	543	544	545	546	547	548	549	550	551	552	553	554	555	556	557	558	559	560	561	562	563	564	565	566	567	568	569	570	571	572	573	574	575	576	577	578	579	580	581	582	583	584	585	586	587	588	589	590	591	592	593	594	595	596	597	598	599	600	601	602	603	604	605	606	607	608	609	610	611	612	613	614	615	616	617	618	619	620	621	622	623	624	625	626	627	628	629	630	631	632	633	634	635	636	637	638	639	640	641	642	643	644	645	646	647	648	649	650	651	652	653	654	655	656	657	658	659	660	661	662	663	664	665	666	667	668	669	670	671	672	673	674	675	676	677	678	679	680	681	682	683	684	685	686	687	688	689	690	691	692	693	694	695	696	697	698	699	700	701	702	703	704	705	706	707	708	709	710	711	712	713	714	715	716	717	718	719	720	721	722	723	724	725	726	727	728	729	730	731	732	733	734	735	736	737	738	739	740	741	742	743	744	745	746	747	748	749	750	751	752	753	754	755	756	757	758	759	760	761	762	763	764	765	766	767	768	769	770	771	772	773	774	775	776	777	778	779	780	781	782	783	784	785	786	787	788	789	790	791	792	793	794	795	796	797	798	799	800	801	802	803	804	805	806	807	808	809	810	811	812	813	814	815	816	817	818	819	820	821	822	823	824	825	826	827	828	829	830	831	832	833	834	835	836	837	838	839	840	841	842	843	844	845	846	847	848	849	850	851	852	853	854	855	856	857	858	859	860	861	862	863	864	865	866	867	868	869	870	871	872	873	874	875	876	877	878	879	880	881	882	883	884	885	886	887	888	889	890	891	892	893	894	895	896	897	898	899	900	901	902	903	904	905	906	907	908	909	910	911	912	913	914	915	916	917	918	919	920	921	922	923	924	925	926	927	928	929	930	931	932	933	934	935	936	937	938	939	940	941	942	943	944	945	946	947	948	949	950	951	952	953	954	955	956	957	958	959	960	961	962	963	964	965	966	967	968	969	970	971	972	973	974	975	976	977	978	979	980	981	982	983	984	985	986	987	988	989	990	991	992	993	994	995	996	997	998	999	1000
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SEIU Local 521
Financial Statement - For the month of November 2007

	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	YTD - Nine months	Actual	YTD - Nine months	Actual	YTD - Nine months
	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget
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SEIU Local 521
Financial Statements - For the month of November 2007

	J	M	A	M	J	J	A	S	O	N	YTD - Nine months	
	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual
39 SOCIAL & ECONOMIC JUSTICE												
40 Committee Meetings				22	534		359		54	300	70	230
41 Conferences					353		193		290	300	300	2,700
42 Committee Solidarity	776									300	1,800	1,700
43 \$1.00 PER MEMBER	4,906	512	1,182		2,487	2,844	3,248	1,275	3,128	9,957	(2,432)	28,123
44 Total Social & Economic	5,682	512	1,204	874	2,887	3,236	3,546	1,467	3,526	9,927	(2,082)	30,523
45 MEMBER ENGAGEMENT												
46 Memorabilia Give aways Mem	627	20,716	17,290	6,215	21,247	82,250	4,371	5,610	5,000	710	5,710	45,000
47 Awards Recognition	530								300		300	2,700
48 Planning & Eval Prep									300		300	2,700
49 \$5 Board Advisory Board Reimbursement									500		500	4,500
50 Many Rental & Bus		1,840	1,945	745		74	1,034	35	4,000		36,000	7,428
51 Member Reimbursement, out of		293	831		1,414	589	1,219		5,000	846	4,452	45,000
52 Transportation & Vehicle Exp	134								500		500	4,500
53 Total Member Involvement	1,641	21,549	20,066	6,955	22,661	82,903	6,613	5,635	10,800	(163)	15,762	140,488
54												
55 NEGOTIATIONS												
56 Printing Contracts	30,337				307	1,447		10,852	5,000		5,000	45,000
57 Meetings & Supplies	440	650	1,067	2,237	2,876	6,527	11,824	5,855	5,000	452	3,636	45,000
58 Negotiations Committee Food									5,000		5,000	45,000
59 Strike Preparations									1,000		1,000	9,000
60 Automatic Strike Fund transfer (\$0.82 per member month)									18,783		18,783	166,730
61 Total Negotiations	30,682	1,556	1,067	2,237	3,183	8,061	11,814	16,487	34,794	1,402	33,396	312,739
62												
63 MEETINGS & EVENTS												
64 Executive Board Meetings			109		666	210		690	2,000	842	1,158	18,000
65 Board Council meetings	234	39	5,464	2,951	4,281	26		12,137	4,500		4,500	29,183
66 \$25 Party & other events	2,836	5,886	22,719	1,565		3,818		23,257	7,000	5,738	282	63,000
67 Advisory Board Meetings	18,570					2,767			12,000		10,200	20,000
68 Miscellaneous									200		200	1,800
69 Total Meetings & Events	18,489	5,965	28,311	6,526	4,948	6,513		37,684	23,794	6,581	17,119	213,389
70												
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SEIU Local 521
Financial Statements - For the month of November 2007

	J	M	A	M	J	J	A	S	A	A	A	A	A	A	A	A	A
	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Budget	Actual	Budget	Actual	YTD - Nine months	Actual	Budget	Actual	
	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual									
122 REPRESENTATIVE DUES																	
123 SEIU ST 65 ea	87,516	396,333	387,807	412,366	424,840	417,330	486,892	424,024	430,848	421,423	9,428	3,677,632	3,954,362	78,730			
124 SEIU Unity Fund ST 50ea	347,800	235,710	247,290	254,750	265,280	261,345	312,184	265,035	266,202	260,878	5,628	2,395,820	2,454,711	58,911			
125 SEIU Members ST 00ea	-	-	-	-	-	-	-	-	61	1	99	840	853	(13)			
126 SEIU Assocn Members IT	-	-	-	-	-	-	-	-	12	12	108						
127 SEIU STATE COUNCIL ST 53ea	197,099	26,639	130,647	187,187	136,906	145,237	184,040	139,366	142,482	138,198	4,333	1,292,406	1,331,196	(48,791)			
128 So Bay C.C. SC 55ea	20,096	1,230	1,172	16,311	14,032	16,062	12,184	11,910	12,102	11,326	778	126,900	125,273	(16,731)			
129 SMO C.C. SC 50ea	4,968	2,571	2,440	2,629	2,371	2,185	2,888	2,453	2,934	2,868	290	29,842	24,856	703			
130 SEIU C.C. SC 50ea	610	1,619	1,990	2,237	1,947	2,196	9,109	2,230	2,862	2,230	676	39,300	30,220	9,080			
131 International C.C. SC 25ea	-	585	1,789	1,854	1,780	1,606	2,042	1,810	1,927	1,900	(278)	14,824	14,112	713			
132 Monterey & Santa Cruz C.C. ST	1,690	2,645	3,609	3,605	4,264	3,989	3,823	3,326	3,302	3,987	(297)	29,720	30,762	(1,042)			
133 CA Labor Fed 55% X 31ea	13,261	5,051	9,187	9,521	9,930	9,725	13,191	9,776	9,046	9,708	(662)	51,428	92,267	(11,839)			
134 So Bay Trades SMO	298	250	280	275	278	275	279	275	280	278	28	2,280	2,430	(150)			
135 Total Representative Dues	1,188,371	782,517	884,881	866,676	864,874	853,718	1,093,990	853,387	871,878	851,779	19,791	7,844,191	8,851,877	(267,686)			
136																	
137 TOTAL EXPENSES	3,584,962	2,280,834	2,112,499	2,216,215	2,416,840	2,507,463	2,612,036	2,484,052	2,380,467	2,366,882	34,788	21,614,116	21,306,307	(62,193)			
138																	
139 TOTAL INCOME LESS TOT.	(642,897)	(283,319)	888,617	(21,997)	(163,230)	(180,964)	273,643	211,334	(2,849)	36,687	38,186	(22,868)	(232,832)	(218,633)			
140																	
141 VOLUNTARY TRANSFERS																	
142 Building Funds																	
143 Automatic Legal Defense Fund									2,375	2,375		94,375	64,278				
144 Strike Fund																	
145 Total Transfers	9,376	9,376	9,376	9,376	9,376	9,376	9,376	9,376	9,376	9,376		94,375	64,278				
146 TOTAL INCOME LESS EXPI	(633,521)	(293,354)	898,043	(12,621)	(172,611)	(170,339)	283,019	220,658	(11,473)	26,013	38,186	(186,873)	(218,607)	(218,633)			

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NEU JOB #21
FINANCIAL STATEMENT FOR THE YEAR OF 2008

Headcount	Budget	Actual	Balance
32792	2,313,718	2,194,836	(118,882)
TOTAL DUES RECEIPTS			
OTHER INCOME			
Interest & Dividends	8,340	14,483	6,143
SEIU521 Administrative Reimbursement	4,147	27,500	23,353
Sublease Rent	4,290	1,747	(2,543)
State Income - SEIU 521 (subsidy)	2,415	-	(2,415)
Total Misc. Income	19,192	43,730	24,538
TOTAL GENERAL FUND INCOME	2,332,640	2,240,113	(92,527)
GENERAL FUND EXPENSES			
ORGANIZING OFFSET	317,262	317,262	0
SALARIES			
Administrative	27,819	34,472	6,653
Admin Support	41,348	24,268	17,080
Director	54,642	77,085	22,443
General Organizer Research	268,340	216,866	51,474
General	98,870	16,800	82,070
Philanthropy	5,865	5,767	98
Other Area Services	18,967	17,341	1,626
Temp General Organizer Research	5,900	131	5,769
Temp General Support	3,900	10,360	(6,460)
Vacation & Comp Time	23,997	11,942	12,055
Total Salaries	607,828	598,534	9,294
PAYROLL RELATED EXPENSES			
Payroll	54,784	67,043	12,259
Payroll Taxes	17,784	17,423	361
Travel Staff Admin	4,000	3,872	128
Travel Staff General Organizer	1,000	1,372	372
Nonunion Int. Launch Admin & Director	9,348	1,224	8,124
Nonunion Int. Launch General Organizer	14,843	10,463	4,380
Telephone Reimbursement	8,200	9,537	(1,337)
Personal Health Exp - including Ward	7,392	6,301	1,091
State Income Tax Fund	9,400	9,400	0
Unemployment Insurance - State Income Tax Fund	190,843	177,360	13,483
Workers Comp Insurance	7,813	7,813	0
Recruiting exp	1,200	211	989
Vacancy Rate - **most position has filled			
Total Payroll Related Expenses	608,849	609,518	(669)
Total Salaries & Payroll Expenses	1,216,677	1,208,052	8,625
MISCELLANEOUS			
Agency Fee Assoc. Exp	12,800	-	12,800
Capital Fund Expenses	1,000	1,000	0
Admin exp share w/ chapter	1,000	672	328

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SEIU Local 62
Financial Statement for the year of 2008

Headcount	Budget	Actual	Actual variance
Free Life insurance to members (SCR MKY)	6,000	2,968	4,732
Life Insurance Reimbursement	4,800	1,872	1,928
Design Scholarship	1,200	1,370	-
Computer Certificate Expenses & MKC. can	100,000	100,000	100,000
Bill. Services	10,000	10,000	-
Life-Sound Expenses	2,100	2,360	(260)
Good & Welfare	3,000	3,000	-
Yeast Miscellaneous:	142,250	81,142	110,408
ARBITRATION & LEGAL	-	-	-
Arbitration Fees	5,000	1,847	2,153
Arbitration	28,700	14,481	2,020
Court Costs	2,750	2,750	-
350.9 Automatic Legal Defense Fund (16.11 per mo)	9,754	9,754	-
Miscellaneous	417	18	400
Yeast Arbitration & Legal	44,421	37,008	7,413
FACILITIES	-	-	-
Rent-SEC	24,000	31,831	60
Rent-FWC	6,330	6,330	-
Rent-Bakersfield apartment	1,547	-	1,547
Rent-Furniture ** no moving	1,200	1,121	(79)
Rent-Santa Cruz Warehouse & Hallway	9,108	9,978	5,431
Rent-Victoria	1,000	800	200
Utilities	22,000	12,562	7,438
Kitchen Supplies	4,000	1,282	768
Gas, Cook Gas & Property Tax	15,944	11,873	4,071
Building Maintenance Security Personnel	12,700	1,794	3,916
Yeast Admin - Facilities	112,821	80,370	28,451
ADMINISTRATIVE - OFFICES	-	-	-
Admin Accr. Fees	8,708	1,208	7,501
Subscriptions	300	227	73
Office Supplies	8,000	4,456	3,544
Office Equipment Leases	40,000	36,254	3,746
Equipment Maintenance & Repair Contracts	8,000	1,714	6,286
Contributions	300	300	-
Research Material & Data	1,800	268	731
Miscellaneous	1,500	1,500	-
Yeast Admin - Offices	67,708	47,787	28,981
COMMUNICATIONS	-	-	-
Printing	13,000	4,948	5,952
Phone	8,000	740	5,260
Wireless Service communications	1,300	1,300	-
Telephone & Internet ** agency exp only	2,500	7,147	(4,647)
Postage	7,000	1,839	5,161

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SEIU Local 521
Finance Statement for the year 2008

Headcount	Budget	Actual	Balance (over)
Printing & Press Prep	230	230	-
Ex Board Advisory Board Reimbursement	417	417	-
Railor Rental & Bus	4,800	114	3,846
Member Reimbursement Low time	5,000	5,000	-
Transportation & Vehicle Expenses	500	500	-
Total Member Reimbursement	12,990	(1,387)	16,837
NEGOTIATIONS			
Printing Contracts	4,147	4,147	-
Meetings & Supplies	5,000	1,075	3,925
Service Preparation	1,500	1,500	-
39074 Automatic Service Fund Transfer (10.73 per m	-	14,276	-
Total Negotiations	10,647	(1,332)	8,282
MEETINGS & EVENTS			
Executive Board Meetings	2,000	2,117	(117)
Steward Council meetings	2,083	2,083	-
121 Party & other events	5,000	5,000	-
Advisory Board Meetings 37 to 5178	6,250	6,250	-
Miscellaneous	147	147	-
Total Meetings & Events	15,480	2,117	(13,363)
REPRESENTATIVE DUES			
31792 SEIU 1500	172,204	412,871	(240,667)
49992 SEIU Union Fund 1500	129,130	274,080	(144,950)
50015 SEIU Local 521	50	163	(113)
24 SEIU Associate Members 10	-	-	-
31792 SEIU State Council 1500	12,423	151,424	(138,999)
26800 5000 SEIU 1500	12,346	11,078	1,268
4130 SMCC CLC 1500	2,347	2,339	8
2300 Finance CLC 1500	2,842	2,874	(32)
7600 Membership CLC 1500	1,383	1,124	259
6600 Membership & State Council 1500	5,827	1,473	4,354
31792 C.A. Labor Fed 1500	3,696	9,230	(5,534)
Building Trades SMCC	300	300	-
Total Representative Dues	247,204	894,945	(647,741)
TOTAL EXPENSES	2,782,862	2,350,425	(432,437)
TOTAL INCOME LESS TOTAL EXPENSES	(228,342)	(18,519)	(217,833)
VOLUNTARY TRANSFERS			
Building Funds	-	-	-
Service Fund	-	-	-
Total Transfers	-	-	-
TOTAL INCOME LESS EXPENSES & T.	(228,342)	(18,519)	(217,833)

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SEIU Local 521
United for Quality Jobs and Quality Public Services

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SEIU

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» Get Involved/Join Up!
» New Organizing
» About Us/Contact Us
 - Vision Statement
 Officers
 Executive Board
 Budget & Actions
 - Committees & Caucuses
 Testimonials
 - Feedback
» Careers

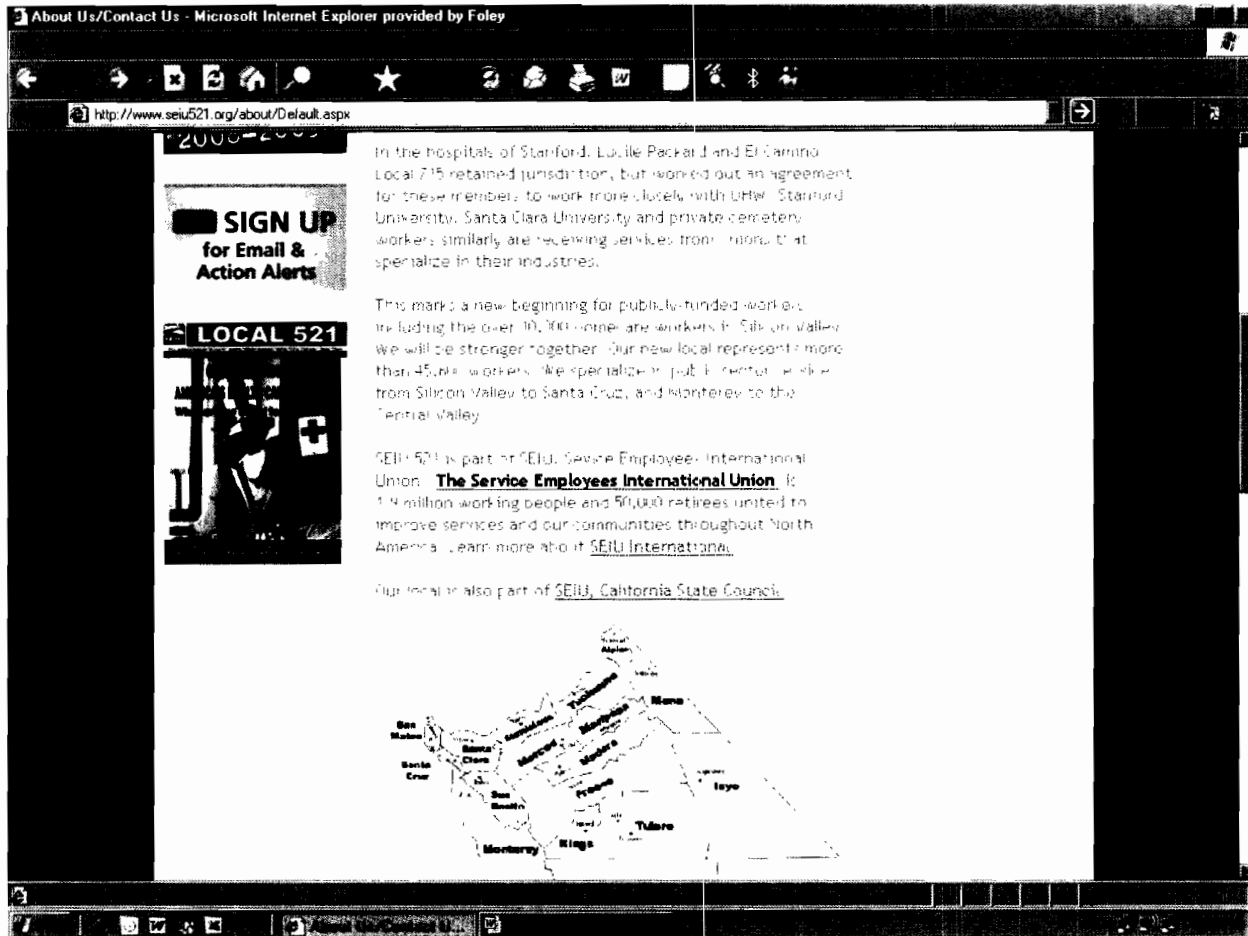
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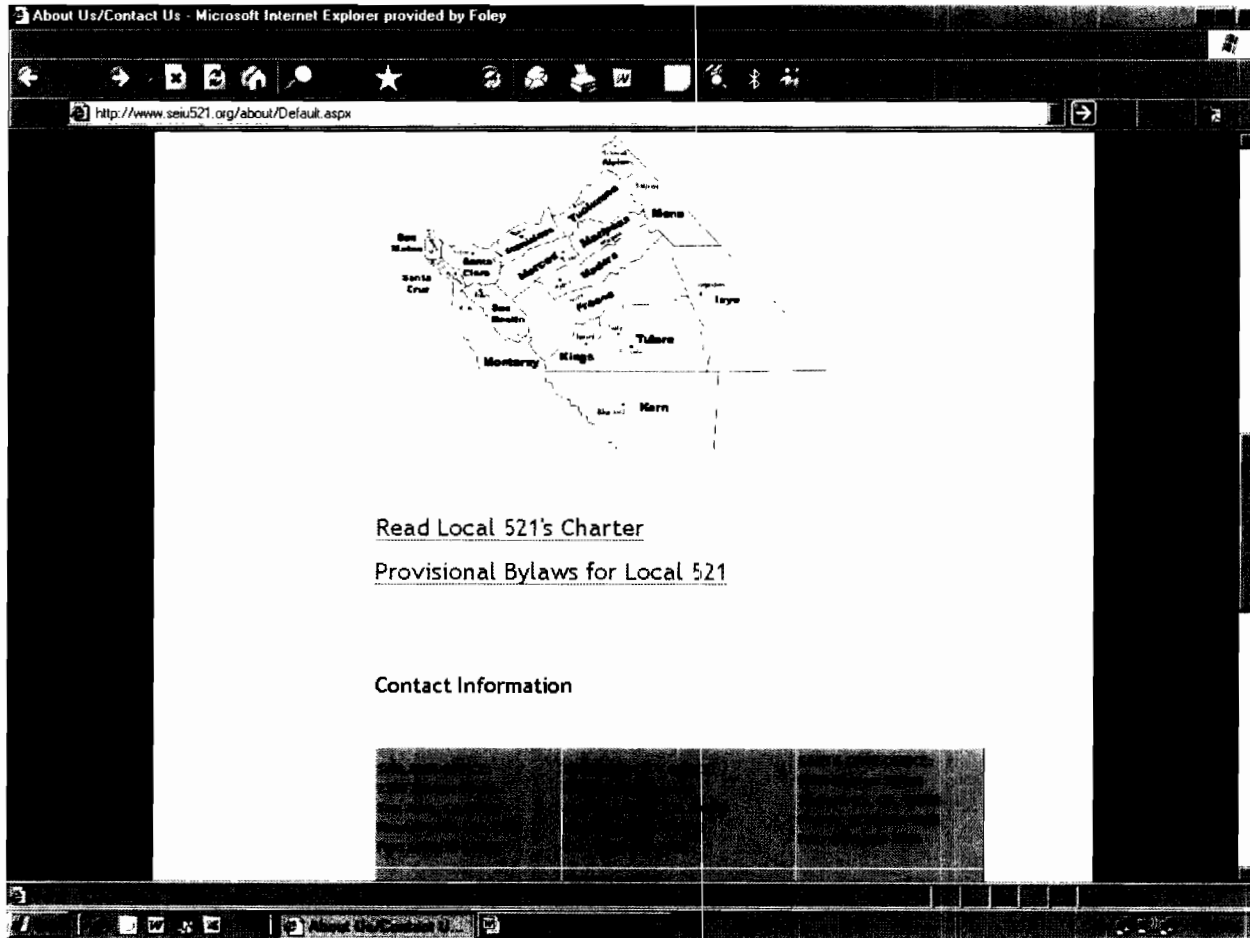
SEIU Local 521
Stronger Together

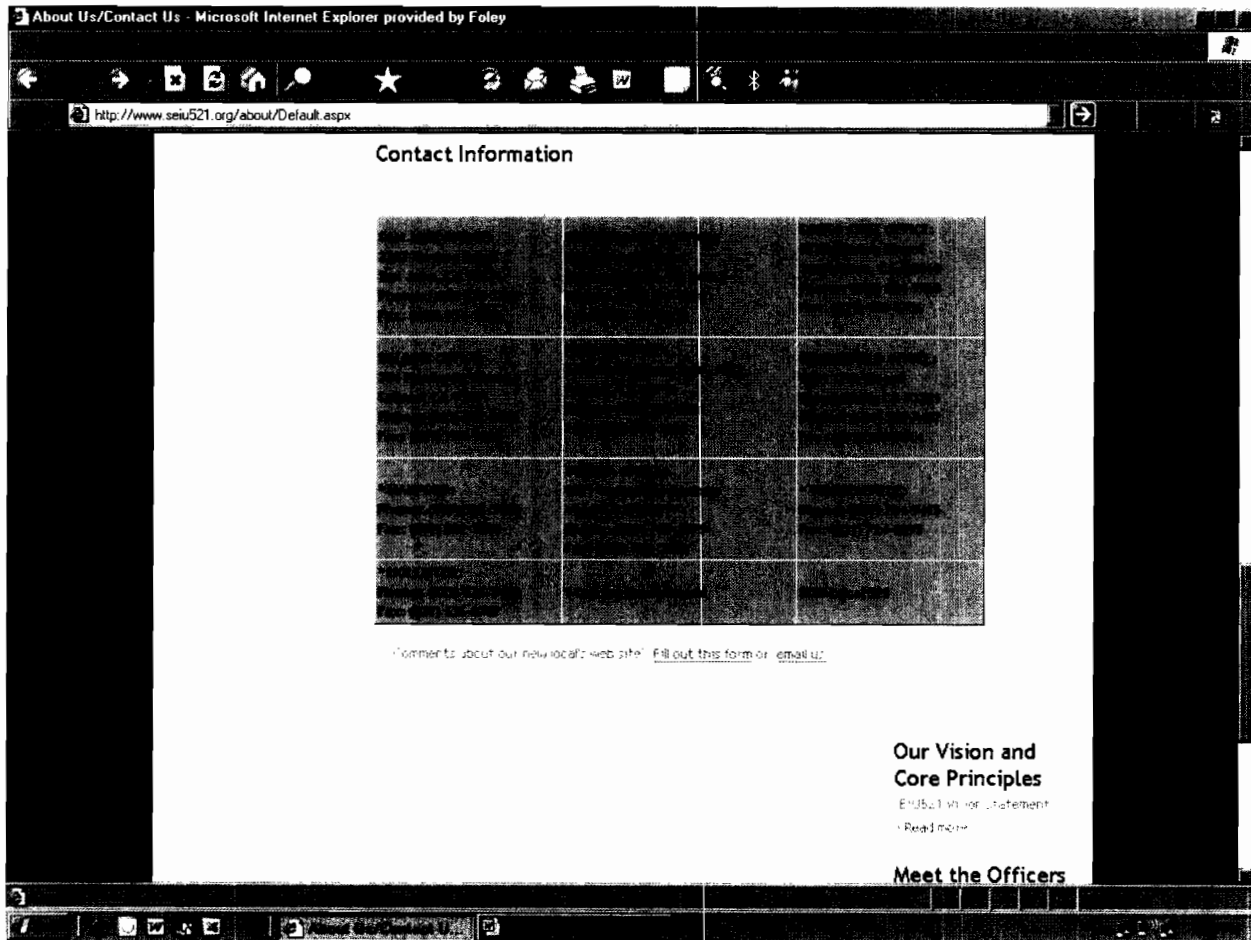
The Advisory Committee met on October 5-7, 2007 and created a new vision statement for Local 521.

[Read the new vision statement and poems about "Baby 521".](#)
 [View the meeting pictures >>](#)

Five locals (415, 535, 740, 715 and 817) have come together to cover the North Central region by forming one larger, more powerful local. On January 2, 2007, our new local received its [charter](#). In March 1, our new local came to life with resources from the other legacy unions and staff was hired expressly for their expertise in publicly-funded work in the hospitals of Stanford, Lucile Packard and El Camino. Local 715 retained jurisdiction, but worked out an agreement







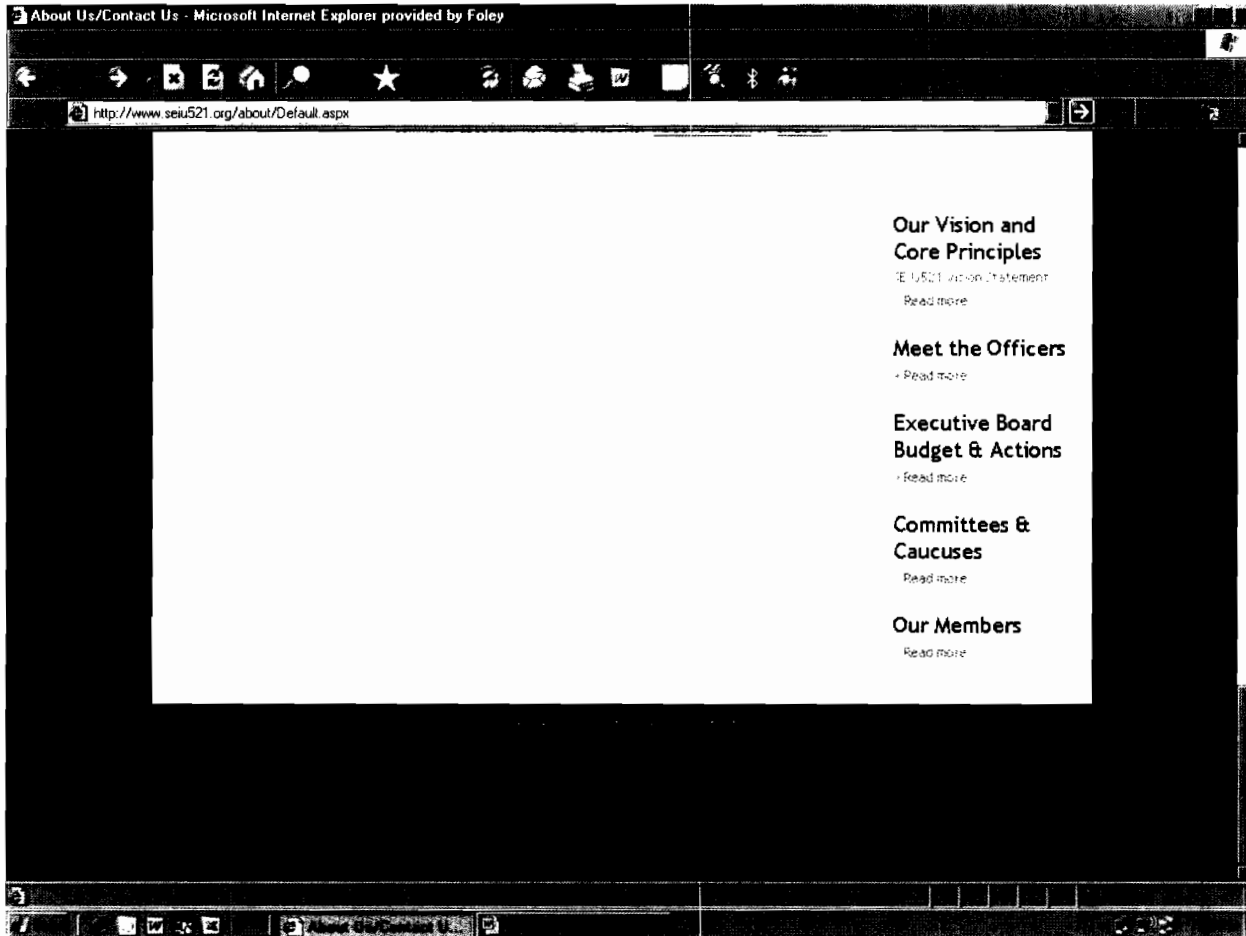


EXHIBIT G

SEIU Local 521

Bank Balance on Saving and Investment accounts

as of August 31, 2007

ITEMS	GL#	ACCOUNT NAME	Bank	Local	ENDING BALANCE as of 8/31/07
1	NA	LEGAL DEFENSE FUND	NA	521	56,250.00
2	NA	CAPITAL RESERVE	NA	521	43,343.92
3	NA	CLARENCE DODGE SCHOLARSHIP	NA	521	21,701.97
4	1017	BUILDING FUND	Commonwealth Credit Union	715	114,169.00
5	1013	CAPITAL RESERVE	Citizens Funds	715	273,997.89
6	1019	CONTINGENCY FUND	Commonwealth Credit Union	715	80,447.40
7	1011	SANTA CLARA COUNTY CHAPTER FUND	Santa Clara Credit Union	715	15,326.83
8	NA	RETIREE BENEFIT TRUST	NA	715	167,478.58
9	1000	STRIKE FUND	Bank of The West	715	250,000.00
10	1006	STRIKE FUND	Citizens Funds	715	141,155.42
11	1018	STRIKE FUND	Commonwealth Credit Union	715	556,749.24
12	NA	STRIKE FUND	NA	521	112,500.00
13	NA	STRIKE FUND	Bay Federal	415	111,184.81
14	NA	STRIKE FUND as of 7/31/07	@ INTERNATIONAL	521	92,443.20
15		Reserve #1	Union Bank of California	817	94,846.53
16		Reserve #2	Union Bank of California	817	471,320.79
17		Reserve #2	Smith Barney	817	82,092.37
Total reserve					\$ 2,685,007.95

18	NA	STRIKE FUND as of 7/31/07	@ INTERNATIONAL	715	402,140.84
19	NA	STRIKE FUND as of 3/31/07	@ INTERNATIONAL	415	27,991.88
20	NA	STRIKE FUND as of 2/28/07	@ INTERNATIONAL	817	46,016.80
21	NA	STRIKE FUND as of 3/31/07	@ INTERNATIONAL	700	69,098.31
					\$ 545,247.83

PAC money					
22		PAC - Candidates	US Bank - Olson	521	29,246.00
23		PAC - Issues	US Bank - Olson	521	2,003.00
24		PAC - Independent Expenditure	US Bank - Olson	521	-
25		PAC - Candidates	US Bank - Olson	715	3,089.44
26		PAC - Issues	US Bank - Olson	715	58.47
27		PAC - Candidates	Union Bank of California	817	12,979.58
28		PAC - Issues	Union Bank of California	817	5,338.43
29		Reserve #1	Morgan Stanley	700	133,318.16 *

30	1003	AGENCY FEE	Bank of The West	521	134,234.15
31	1002	ORGANIZING FUND	Bank of The West	521	1,232,704.98

* - bank statement balance as of June 30, 2007.

EXHIBIT H

SEIU Local 521

Bank Balance on Saving and Investment accounts
as of September 30, 2007

ITEMS	GL#	ACCOUNT NAME	Bank	Local	ENDING BALANCE as of 9/30/07
1	NA	LEGAL DEFENSE FUND	NA	521	65,625.00
2	NA	CAPITAL RESERVE	NA	521	44,343.92
3	NA	CLARENCE DODGE SCHOLARSHIP	NA	521	23,201.97
4	1017	BUILDING FUND	Commonwealth Credit Union	715	114,206.54
5	1013	CAPITAL RESERVE	Citizens Funds	715	274,988.66
6	1019	CONTINGENCY FUND	Commonwealth Credit Union	715	80,447.40
7	1011	SANTA CLARA COUNTY CHAPTER FUND	Santa Clara Credit Union	715	15,326.83
8	NA	RETIREE BENEFIT TRUST	NA	715	177,878.58
9	1000	STRIKE FUND	Bank of The West	715	250,000.00
10	1006	STRIKE FUND	Citizens Funds	715	141,665.84
11	1018	STRIKE FUND	Commonwealth Credit Union	715	558,703.20
12	NA	STRIKE FUND	NA	521	131,250.00
13	NA	STRIKE FUND	Bay Federal	415	111,545.58
14	NA	STRIKE FUND as of 9/30/07	@ INTERNATIONAL	521	136,444.40
15		Reserve #1	Union Bank of California	817	94,846.53
16		Reserve #2	Union Bank of California	817	471,320.79
17		Reserve #2	Smith Barney	817	82,092.37
Total reserve					\$ 2,773,887.61

18	NA	STRIKE FUND as of 7/31/07	@ INTERNATIONAL	715	402,140.84
19	NA	STRIKE FUND as of 3/31/07	@ INTERNATIONAL	415	27,991.88
20	NA	STRIKE FUND as of 2/28/07	@ INTERNATIONAL	817	46,016.80
21	NA	STRIKE FUND as of 3/31/07	@ INTERNATIONAL	700	69,098.31
					\$ 545,247.83

PAC money					
22		PAC - Candidates	US Bank - Olson	521	36,947.25
23		PAC - Issues	US Bank - Olson	521	3.70
24		PAC - Independent Expenditure	US Bank - Olson	521	4,908.61
25		PAC - Candidates	US Bank - Olson	715	closed
26		PAC - Issues	US Bank - Olson	715	closed
27		PAC - Candidates	Union Bank of California	817	12,979.58
28		PAC - Issues	Union Bank of California	817	5,338.43
29		Reserve #1	Morgan Stanley	700	133,318.16 *
30	1003	AGENCY FEE	Bank of The West	521	145,759.58
31	1002	ORGANIZING FUND	Bank of The West	521	1,919,569.76

* - bank statement balance as of June 30, 2007.

EXHIBIT I

SEIU Local 521

Bank Balance on Saving and Investment accounts

as of November 30, 2007

ITEMS	GL#	ACCOUNT NAME	Bank	Local	ENDING BALANCE as of 11/30/07
1	1005	CONTINGENCY FUND	Bank of The West	521	80,447.40
2	2180	RETIREE BENEFIT TRUST	NA	521	198,747.60
3	2181	CLARENCE DODGE SCHOLARSHIP	NA	521	20,201.97
4	2182	CAPITAL RESERVE	NA	521	321,617.00
5	2183	LEGAL DEFENSE FUND	NA	521	226,178.00
6	2184	BUILDING FUND	NA	521	113,650.00
7	2334	SANTA CLARA COUNTY CHAPTER FUND	Bank of The West	521	15,326.83
8	1000	STRIKE FUND	Bank of The West	521	250,000.00
9	1006	STRIKE FUND	Bank of The West	521	558,006.09
10	2185	STRIKE FUND	NA	521	559,747.00
11	NA	STRIKE FUND as of 10/31/07	@ INTERNATIONAL	521	158,643.20
12	NA	STRIKE FUND	Bay Federal	415	111,901.39
13		Reserve #1	Union Bank of California	817	95,333.90
14		Reserve #2	Union Bank of California	817	473,842.81
15		Reserve #2	Smith Barney	817	83,093.78
Total reserve					\$ 3,266,736.97
16	NA	STRIKE FUND as of 7/31/07	@ INTERNATIONAL	715	402,140.84
17	NA	STRIKE FUND as of 3/31/07	@ INTERNATIONAL	415	27,991.88
18	NA	STRIKE FUND as of 2/28/07	@ INTERNATIONAL	817	46,016.80
19	NA	STRIKE FUND as of 3/31/07	@ INTERNATIONAL	700	69,098.31
					\$ 545,247.83
PAC money					
20		PAC - Candidates	US Bank - Olson	521	22,244.25
21		PAC - Issues	US Bank - Olson	521	2,050.70
22		PAC - Independent Expenditure	US Bank - Olson	521	24,763.16
23		PAC - Candidates	Union Bank of California	817	12,961.58
24		PAC - Issues	Union Bank of California	817	5,323.43
25		Reserve #1	Morgan Stanley	700	119,856.50
26	1003	AGENCY FEE	Bank of The West	521	168,283.00
27	1002	ORGANIZING FUND	Bank of The West	521	1,935,177.04

** Balance as of 10/31/2007

EXHIBIT J

SEIU Local 521

Bank Balance on Saving and Investment accounts

as of December 31st, 2007

ITEMS	GL#	ACCOUNT NAME	Bank	Local	ENDING BALANCE as of 12/31/07
1	1005	CONTINGENCY FUND	Bank of The West	521	80,447.40
2	2180	RETIREE BENEFIT TRUST	NA	521	209,147.00
3	2181	CLARENCE DODGE SCHOLARSHIP	NA	521	21,702.00
4	2182	CAPITAL RESERVE	NA	521	322,617.00
5	2183	LEGAL DEFENSE FUND	NA	521	235,553.00
6	2184	BUILDING FUND	NA	521	113,650.00
7	2334	SANTA CLARA COUNTY CHAPTER FUND	Bank of The West	521	15,326.83
8	1000	STRIKE FUND	Bank of The West	521	250,000.00
9	1006	STRIKE FUND	Bank of The West	521	561,206.25
10	2185	STRIKE FUND	NA	521	559,747.00
11	NA	STRIKE FUND as of 11/30/07	@ INTERNATIONAL	521	180,814.40
12	NA	STRIKE FUND	Bay Federal	415	112,246.81
13		Reserve #1	Union Bank of California	817	95,424.91
14		Reserve #2	Union Bank of California	817	474,315.34
15		Reserve #2	Smith Barney	817	83,093.78
Total reserve					\$ 3,315,291.72
16	NA	STRIKE FUND as of 12/31/07	@ INTERNATIONAL	715	NA
17	NA	STRIKE FUND as of 3/31/07	@ INTERNATIONAL	415	27,991.88
18	NA	STRIKE FUND as of 2/28/07	@ INTERNATIONAL	817	46,016.80
19	NA	STRIKE FUND as of 3/31/07	@ INTERNATIONAL	700	69,098.31
					\$ 143,106.99
PAC money					
20		PAC - Candidates	US Bank - Olson	521	24,999.40
21		PAC - Issues	US Bank - Olson	521	6,105.85
22		PAC - Independent Expenditure	US Bank - Olson	521	24,763.16
23		PAC - Candidates	Union Bank of California	817	12,958.58
24		PAC - Issues	Union Bank of California	817	5,320.43
25		Reserve #1	Morgan Stanley	700	27,580.77
26	1003	AGENCY FEE	Bank of The West	521	180,263.26
27	1002	ORGANIZING FUND	Bank of The West	521	1,945,590.56

EXHIBIT K

SEIU Local 521
Bank Balance on Saving and Investment accounts
as of Jan. 31st, 2008

ITEMS	GL#	ACCOUNT NAME	Bank	Local	ENDING BALANCE as of 1/31/2008
1	1005	CONTINGENCY FUND	Bank of The West	521	80,447.40
2	2180	RETIREE BENEFIT TRUST	NA	521	218,547.60
3	2181	CLARENCE DODGE SCHOLARSHIP	NA	521	22,951.97
4	2182	CAPITAL RESERVE	NA	521	273,617.70
5	2183	LEGAL DEFENSE FUND	NA	521	195,307.00
6	2184	BUILDING FUND	NA	521	113,650.00
7	2334	SANTA CLARA COUNTY CHAPTER FUND	Bank of The West	521	15,076.83
8	1000	STRIKE FUND	Bank of The West	521	250,000.00
9	1006	STRIKE FUND	Bank of The West	521	562,653.28
10	2185	STRIKE FUND	NA	521	763,503.70
11	NA	STRIKE FUND as of 11/30/07	@ INTERNATIONAL	521	180,814.40
12	NA	STRIKE FUND	Bay Federal	415	112,853.46
13		Reserve #1	Union Bank of California	817	95,509.77
14		Reserve #2	Union Bank of California	817	474,757.28
15		Reserve #2	Smith Barney	817	83,093.78
Total reserve					\$ 3,442,784.17
PAC money					
16		PAC - Candidates	US Bank - Olson	521	18,999.40
17		PAC - Issues	US Bank - Olson	521	6,105.85
18		PAC - Independent Expenditure	US Bank - Olson	521	24,763.16
19		PAC - Candidates	Union Bank of California	817	12,955.58
20		PAC - Issues	Union Bank of California	817	5,317.47
21		Reserve #1	Morgan Stanley	700	27,580.77
22	1003	AGENCY FEE	Bank of The West	521	225,222.31
23	1002	ORGANIZING FUND	Bank of The West	521	1,288,235.42

EXHIBIT L

Dues Receipts of the year of 2007

	A	B	C	D	E	F	G	H	I	J	L
1		Mar-07	Apr-07	May-07	Jun-07	Jun-07	Aug-07	Sep-07	Oct-07	Nov-07	YTD 2007
2	Dues Receipts										
3	Counties										
4	Dues - Santa Clara County	470,448	524,339	787,487	526,439	528,349	531,773	529,842	799,449	534,889	5,233,014
5	Dues - San Mateo County	119,751	74,084	73,818	80,835	74,292	74,173	112,154	75,557	77,623	762,287
6	Dues - Kern County	259,178	172,739	172,899	173,438	175,510	271,279	185,585	187,293	192,003	1,789,923
7	Dues - San Benito County	11,969	10,763	11,034	10,640	15,154	10,398	10,565	16,318	11,170	108,011
8	Dues - Santa Cruz County	98,732	50,949	148,372	101,453	102,876	106,070	52,079	151,251	102,148	913,930
9	Dues - KINGS County	11,988	5,760	17,118	11,232	5,598	11,196	11,070	5,544	-	79,506
10	Dues - TULARE County	4,376	6,501	9,045	9,861	8,060	9,111	23,612	17,060	3,711	91,338
11	Dues - MONTEREY COUNTY	109,335	142,998	143,495	143,380	147,711	153,549	187,499	154,879	154,776	1,337,622
12	Dues - STANISLAUS COUNT	-	-	-	-	-	-	155,395	-	36,239	191,635
13	Dues - MARIPOSA COUNTY	-	4,890	4,798	5,414	5,665	-	-	-	-	20,767
14	Dues -FRESNO COUNTY	-	116,016	347,306	230,008	232,837	239,111	468,354	208,305	240,246	2,082,183
15	Dues -MADERA (COMPA) COUNTY							8,336	-	-	8,336
16	Dues -MADERA (SEMC) COUNTY							3,240	-	-	3,240
17	Courts										
18	Dues - Santa Clara Sup Court	39,116	39,290	59,229	39,918	41,282	41,641	41,848	63,541	42,781	408,647
19	Dues - San Mateo Sup Court	14,531	14,663	14,876	15,070	14,912	14,838	22,265	14,996	15,401	141,552
20	Dues - SANTA CRUZ COURT	2,730	5,479	5,570	8,881	5,653	5,627	5,567	8,221	5,655	53,383
21	Dues - SAN BENITO COURT	996	451	929	940	961	943	957	1,447	1,015	8,641
22	Dues - KINGS COURT	1,206	1,224	1,242	1,260	1,260	1,908	1,332	1,332	1,314	12,078
23	Dues - TULARE COURT	3,890	6,741	6,854	4,958	4,958	7,595	5,158	5,130	5,303	50,588
24	Dues - MONTEREY COURT	10,543	-	5,293	5,383	5,487	11,281	5,527	5,519	5,432	54,465
25	Dues - MARIPOSA COURT	-	348	314	324	334	-	-	-	-	1,320
26	Cities										
27	Dues - City of Menlo Park	8,501	4,276	13,002	8,712	9,175	14,134	8,737	8,850	8,892	84,279
28	Dues - City of Palo Alto	38,654	39,012	39,823	38,718	39,907	62,546	40,185	40,395	40,745	379,985
29	Dues - City of East Palo Alto	2,299	1,506	833	821	1,743	2,714	1,917	1,875	1,808	15,516
30	Dues - City of Redwood City	15,498	15,548	8,507	23,054	23,120	15,512	15,542	15,604	23,502	155,888
31	Dues - City of San Mateo	6,838	3,397	-	13,528	6,470	6,699	6,723	10,042	6,778	60,474
32	Dues - City of San Mateo GU	8,956	9,071	13,636	4,592	4,599	13,916	9,147	14,024	14,090	92,031
33	Dues - City of Mtn View	10,796	10,902	16,452	11,032	11,315	11,374	11,368	17,123	11,455	111,817
34	Dues - City of Sunnyvale	1,606	1,623	2,503	1,614	1,585	1,570	1,524	1,551	2,390	15,966
35	Dues - City of EXETER	585	585	585	585	585	624	605	546	566	5,265
36	Dues - City of Delano	5,504	5,511	5,484	5,604	5,687	8,521	5,799	5,681	5,777	53,569
37	Dues - City of Salinas	9,865	10,062	10,156	10,156	9,814	9,787	9,814	9,663	9,539	88,856
38	Dues - City of Santa Cruz	21,256	21,050	23,786	22,448	23,527	23,719	22,746	22,412	24,312	205,257
39	Dues - City of Watsonville	2,444	2,404	3,606	2,422	2,535	2,643	2,621	4,004	2,640	25,320
40	Dues - City of King	689	694	694	347	694	1,045	695	696	674	6,228
41	Dues - City of Hanford	4,365	2,175	6,641	4,400	4,402	3,930	2,161	6,529	4,404	39,006
42	Dues - City of TAFT	517	-	481	157	564	905	249	264	380	3,518
43	Dues - City of WASCO	500	917	1,074	1,074	1,074	537	1,148	1,867	-	8,189
44	Dues - City of CORCORAN	351	312	663	351	312	312	-	351	702	3,354
45	Dues - City of Scotts Valley	1,317	1,342	1,395	1,395	1,395	1,476	1,482	1,489	1,494	12,786
46	Dues - City of Shafter	925	2,696	1,753	1,753	1,756	1,758	1,722	1,723	1,725	15,809
47	Dues - City of Tulare	1,642	4,907	7,871	3,521	3,625	5,594	3,823	4,043	4,180	39,205
48	Dues - City of Bakersfield	25,485	25,565	25,743	25,635	25,745	38,662	26,056	26,261	26,148	245,300
49	Dues - City of HOLLISTER	2,116	1,018	2,973	1,922	2,004	1,932	3,996	-	1,995	17,956
50	Dues - City of COALINGA	536	1,109	1,678	1,159	1,174	1,174	1,724	1,123	1,145	10,822
51	Dues - City of LINDSAY	-	467	240	212	106	304	389	185	185	2,088
52	Dues - City of ARVIN	-	658	660	729	468	847	554	588	533	5,037

Dues Receipts of the year of 2007

	A	B	C	D	E	F	G	H	I	J	L
1		Mar-07	Apr-07	May-07	Jun-07	Jun-07	Aug-07	Sep-07	Oct-07	Nov-07	YTD 2007
53	Schools										
54	Dues - Santa Clara COE	41,089	40,873	41,237	41,427	41,111	37,842	41,737	42,153	42,631	370,100
55	Dues - San Mateo COE	6,188	6,115	6,108	6,066	6,197	5,522	5,324	5,731	5,886	53,137
56	Dues - Campbell UHSD	2,537	2,559	2,559	2,554	2,856	2,128	2,155	2,498	2,677	22,522
57	Dues - Cupertino USD	9,116	9,316	9,162	9,453	8,302	7,918	8,398	8,975	9,327	79,967
58	Dues - Los Gatos JUHSD	4,611	4,542	4,787	4,827	4,648	2,196	2,991	4,922	4,951	38,476
59	Dues - Morgan Hill UHSD	9,920	9,601	9,597	9,942	7,718	3,830	4,658	10,452	10,427	76,144
60	Dues - Orchard Elem.	818	828	889	-	860	797	217	960	984	6,354
61	Dues - West Valley CCD	14,430	14,592	14,552	14,456	14,110	13,233	14,127	15,645	15,630	130,776
62	Dues - Foothill - DeAnza CCD	31,350	31,442	31,274	31,327	31,433	29,538	27,243	28,798	-	242,405
63	Dues - CABRILLO COLLEGE	11,292	11,464	6,561	-	-	-	-	-	-	29,317
64	Dues - GONZALES UNIFIED	187	-	178	178	178	-	-	178	178	1,075
65	Dues - STANDARD SCHOOL	1,285	-	1,285	2,560	-	1,278	734	1,631	1,827	10,599
66	Dues - San Lorenzo Valley USI	3,706	3,669	-	-	-	-	-	14,869	-	22,244
67	Dues - TAFT UNION HIGH SC	-	1,556	1,556	1,556	1,516	1,073	1,113	1,529	1,529	11,430
68	Dues - EDISON ELEMENTAR	-	480	-	493	493	1,178	221	440	440	3,746
69	Dues - RIVERDALE UNIFIED	-	-	1,441	1,440	1,440	1,398	2,952	1,470	1,620	11,761
70	Dues - LAIDLAW EDUCATIO	-	-	-	6,308	166	4,641	29,099	6,277	6,162	52,652
71	Dues - FRESNO UNIFIED SCI	-	-	-	-	26,170	28,606	102,542	26,849	26,708	210,875
72	Dues - FASTA	-	-	-	-	-	-	30,653	6,425	10,094	47,172
73	UHW & L1877										
74	Dues - Santa Clara University	3,686	3,943	3,818	4,073	3,762	5,983	2,153	3,661	3,846	34,924
75	Dues - Bon Appetit/SantaC U.	24	-	-	-	-	-	-	-	-	24
76	Dues - Standford	40,032	41,760	43,154	45,288	39,644	43,946	42,468	20,486	68,139	384,916
77	Dues - SLAC	10,184	24,519	35,749	13,298	34,453	25,559	24,805	11,260	25,835	205,664
78	Dues - USW Hospitals	-	-	-	-	-	-	21,949	-	-	21,949
79	Dues - Cardinal Cogen	990	993	1,000	1,004	922	858	1,648	790	(67)	8,137
80	Dues - Bon Appetit/Standford	-	-	-	-	-	-	-	-	-	-
81	Private Non-profit										
82	Dues - Alliance for Comm Care	9,819	9,617	9,583	13,925	9,175	8,801	8,937	8,607	13,241	91,706
83	Dues - Community Solutions	4,555	1,161	3,971	2,322	1,099	3,511	2,526	2,750	4,312	26,206
84	Dues - Gardner Health	5,733	5,591	8,406	5,906	5,929	6,066	8,789	5,802	5,834	58,056
85	Dues - Rebekah Children's Hm	2,564	2,637	2,521	2,605	2,517	3,830	2,530	2,795	3,110	25,108
86	Dues - SC Bar Foundation	1,745	1,731	1,766	1,643	1,716	1,663	1,733	1,758	1,969	15,725
87	Dues - Starlight	4,263	4,452	4,973	5,182	4,668	5,038	5,054	4,737	5,478	43,844
88	Homecares										
89	Dues - Addus Health Center	1,267	1,114	1,139	1,145	1,242	1,185	1,210	1,338	1,239	10,879
90	Dues - IHSS San Mateo Co.	46,781	47,519	46,832	47,645	48,548	48,373	50,367	50,039	51,292	437,396
91	Dues - IHSS Santa Clara Co.	194,614	184,800	175,301	190,544	197,732	195,859	195,917	206,883	210,321	1,751,971
92	Dues - MidPen Homecare	-	2,726	4,729	-	3,011	2,308	2,748	4,229	-	19,750
93	Dues - OACM	1,894	2,808	2,023	1,914	2,002	1,876	2,820	1,901	-	17,237
94	Dues - BEAR VALLEY	480	1,411	1,460	976	1,068	1,043	1,001	958	1,445	9,842
95	Special Districts										
96	Dues - El Camino Hospital	33,140	21,976	21,733	21,637	20,419	27,287	18,133	17,672	19,377	201,375
97	Dues - Housing Authority-SCC	5,798	5,910	8,758	5,731	5,750	5,733	5,728	5,783	10,145	59,337
98	Dues - Humane Society	767	410	750	742	819	770	1,274	837	833	7,202
99	Dues - Valley Transit Authorit	18,233	18,228	27,231	18,666	18,396	18,426	18,370	18,231	27,703	183,485
100	Dues - MACSA	-	5,670	2,880	2,805	3,079	2,848	2,814	-	5,780	25,877
101	Dues - HOPE REHABILITATI	4,792	5,106	4,997	2,699	5,248	5,573	5,356	5,327	5,381	44,478
102	Dues - YOSEMITE CONC	15,175	12,472	24,901	31,508	31,734	49,216	30,601	28,862	27,337	251,804
103	Dues - Community Act Part Ke	11,518	18,182	11,808	9,895	8,460	8,467	2,773	11,590	11,219	93,912
104	Dues - SANTA CRUZ METRO	2,707	2,721	10,772	3,234	2,179	-	2,759	5,494	8,149	38,017
105	Dues - SANTA CRUZ COMM	3,574	-	2,770	1,496	416	511	1,177	1,699	-	11,642
106	Dues - SALUD PARA LA GEN	6,028	-	7,535	2,021	4,842	4,038	4,364	8,725	4,736	42,288
107	Dues - ARVIN-EDISON WATI	688	725	725	725	688	707	1,069	996	615	6,938
108	Dues - COMMUNITY ACT P M	920	2,914	2,101	1,890	1,933	3,314	3,197	3,196	3,165	22,630
109	Dues - MONTEREY REGIONA	1,575	-	-	-	6,233	1,550	1,544	1,489	1,499	13,890
110	Dues - HOPE - SAN JOSE	-	-	-	2,669	-	-	-	-	-	2,669
111	Dues - San Andreas Regional C	15,542	15,962	16,240	16,344	16,068	15,605	(149)	15,627	15,664	126,903
112	Dues - LINDSAY STRATHMC	114	114	57	172	114	95	75	75	75	892
113	Dues - SSJUD	225	213	200	200	200	200	200	200	200	1,838
114	Dues - MONTEREY CHILDRE	1,000	-	1,026	-	-	-	-	-	-	2,026
115	Dues - GOLDEN VALLEY HE	8,140	4,048	12,055	8,242	8,948	9,152	13,895	9,826	9,592	83,899
116	Dues - SAN BENITO CTY WA	58	285	431	289	352	357	364	375	820	3,332
117	Dues - SOQUEL CREEK WAT	552	974	487	-	974	487	-	974	487	4,935
118	Dues - CHAMBERLAIN'S CH	955	952	766	695	695	-	732	1,560	890	7,245
119	Dues - MARINA COAST WAT	1,292	1,279	1,281	1,235	1,286	1,345	1,342	1,337	1,349	11,747

Dues Receipts of the year of 2007

	A	B	C	D	E	F	G	H	I	J	L
1		Mar-07	Apr-07	May-07	Jun-07	Jun-07	Aug-07	Sep-07	Oct-07	Nov-07	YTD 2007
120	Dues - MONTEREY BAY UN	979	977	-	-	-	-	-	-	-	1,956
121	Dues - COMMUNITY BRIDG	487	508	476	506	-	491	1,009	446	533	4,437
122	Dues - WOMEN'S CRISIS SUP	537	585	561	559	497	529	511	567	528	4,873
123	Dues - CENTRAL CA LEGAL	1,053	2,156	2,115	2,082	2,165	2,132	2,307	2,520	2,596	19,126
124	Dues - Housing Authority-MRY	3,568	3,503	3,416	3,496	-	6,902	3,467	3,517	3,570	31,439
125	Dues - PENINSULA DENTAL	378	-	-	-	-	-	(378)	-	-	-
126	Dues - CHISPA HOUSING MA	-	1,155	1,665	853	853	-	1,252	864	1,538	8,180
127	Dues - MV PUBLIC TRANSPC	-	3,796	1,912	1,856	1,856	1,800	1,828	1,828	1,828	16,702
128	Dues - ACHIEVEKIDS	-	5,645	5,576	5,531	8,303	5,592	5,572	5,500	5,954	47,672
129	Dues - PENINSULA JEWISH C	-	2,029	1,956	-	2,764	877	877	2,229	2,332	13,062
130	Dues - CHILDREN'S SERVICE	-	2,016	-	2,991	2,770	-	3,371	-	3,944	15,092
131	Dues - JEWISH COMM CTR -	-	718	694	686	264	-	238	985	1,081	4,666
132	Dues - AMERICAN REDCROS	-	-	2,472	2,429	2,593	2,662	7,372	2,711	2,545	22,785
133	Dues - Housing Authority-FAT	-	-	-	1,419	1,386	2,968	12,834	2,921	2,975	24,502
134	Dues - KERN REGIONAL CENTER						9,020	44,108	8,491	8,980	70,599
135	Dues - STUDENT TRANSPORTATION						-	3,290	-	-	3,290
136	Dues - Associate Members	206	-	472	-	86	-	-	-	-	764
137	Dues - Retirees	1,701	339	1,690	-	924	1,257	815	765	622	8,112
138	Dues - 521 Staff Members	1,076	771	1,363	1,824	1,888	2,710	1,598	1,570	1,421	14,222
139	Total Dues Receipts	1,937,972	1,960,198	2,661,404	2,182,557	2,224,147	2,412,425	2,867,623	2,595,318	2,358,290	21,199,934
140	Other Income										
141	Interest / Dividend Income	-	6,158	7,601	6,986	7,767	10,529	15,063	20,039	4,553	78,696
142	Gain / Loss on Investment	-	-	-	-	-	-	-	-	-	-
143	Rebate Income	-	2,247	-	-	-	-	-	-	-	2,247
144	Rebate Org. Income	-	-	-	-	-	-	-	-	-	-
145	Rental Income	3,311	3,311	3,311	4,626	3,457	3,536	3,391	3,761	3,536	32,240
146	Misc. Income	383	61	-	47	234	15	(378)	298	-	659
147	ADMINISTRATION FEES	-	25,000	-	-	-	-	-	-	25,000	50,000
148											
149	Total Receipts	1,941,666	1,996,975	2,672,316	2,194,216	2,235,604	2,426,506	2,885,698	2,619,416	2,391,379	21,363,775

EXHIBIT M

SEIU Local 521
Financial Statement
For the month of May 2007

	B	J	M	O	P	Q	AQ	AR	AS
1		Mar	Apr		May		YTD - Three months		
2		Actual	Actual	Budget	Actual	better/(worse)	Budget	Actual	better/(worse)
3	TOTAL DUES RECEIPTS	1,937,972	1,960,198	2,376,957	2,661,404	284,446	7,130,872	6,559,573	(571,299)
4	OTHER INCOME								
5	Interest & Dividends	-	6,158	2,400	7,601	5,201	7,200	13,760	6,560
6	SMIHSS Administrative Reimbu	-	25,000	5,000	-	(5,000)	15,000	25,000	10,000
7	Sublease Rent	3,311	3,311	3,600	3,311	(289)	10,800	9,933	(867)
8	Misc. Income	383	2,308	-	-	-	-	2,691	2,691
9	Total Misc. Income	3,694	36,777	11,000	10,912	(88)	33,000	51,384	18,384
10									
11	TOTAL GENERAL FUND INCO	1,941,666	1,996,975	2,387,957	2,672,316	284,359	7,163,872	6,610,956	(552,916)
12									
13	GENERAL FUND EXPENSES								
14									
15	ORGANIZING OFFSET	301,077	301,077	301,077	301,077	(0)	903,232	903,232	-
16									
17	SALARIES								
18	Administrative	29,293	34,472	37,345	34,472	2,873	112,035	98,237	13,797
19	Admin Support	15,732	18,304	37,674	32,391	5,283	113,021	66,427	46,594
20	Directors	63,466	65,828	83,896	65,581	18,315	251,688	194,876	56,812
21	Internal Organizers/Research	179,499	207,013	252,575	218,022	34,553	757,726	604,534	153,192
22	Clerical	58,721	67,066	68,579	54,179	14,400	205,736	179,967	25,770
23	Facilities	2,669	3,321	3,337	3,080	257	10,010	9,070	939
24	Data Base Services	17,152	21,396	23,217	22,889	328	69,650	61,437	8,213
25	Temp. Internal Organizers/Res	2,889	3,440	5,000	5,190	(190)	15,000	11,519	3,481
26	Temp. Clerical/Support	915	645	3,000	4,275	(1,275)	9,000	5,835	3,165
27	Vacation & Comp Time	5,611	656	25,331	5,067	20,264	75,993	11,334	64,659
28	Total Salaries	375,947	422,143	539,953	445,146	94,807	1,619,858	1,243,236	376,622
29	PAYROLL RELATED EXPENSES								
30	Pension	102,326	28,766	70,927	58,608	12,319	212,781	189,700	23,081
31	Payroll Taxes Expenses	30,413	57,561	50,662	26,190	24,473	151,986	114,163	37,823
32	Travel Staff-Admin	951	3,012	1,500	5,877	(4,377)	4,500	9,841	(5,341)
33	Travel Staff- Internal Organizer	5,977	9,614	3,000	3,634	(634)	9,000	19,225	(10,225)
34	Mileage/Ins. Reimb.-Admin & D	2,209	1,049	10,392	509	9,883	31,176	3,766	27,410
35	Mileage/Ins. Reimb.-Internal Or	15,982	17,963	21,475	17,106	4,369	64,425	51,051	13,374
36	Telephone Reimbursement	3,040	2,298	7,500	2,431	5,069	22,500	7,769	14,731
37	Retiree Health Exp	3,410	7,969	5,701	2,334	3,366	17,102	13,714	3,388
38	Retire Benefit Trust Fund	10,400	10,400	10,400	10,400	-	31,200	31,200	-
39	Benefits/Health, Dental, Vision,	94,218	188,515	163,718	111,093	52,624	491,153	393,826	97,327
40	Workers Comp Insurance	23,737	7,613	20,698	7,613	13,085	62,095	38,963	23,133
41	Recruiting exp	909	1,394	1,000	1,331	(331)	3,000	3,634	(634)
42	Vacancy Rate (saving)			(88,182)		(88,182)	(264,547)	-	(264,547)
43	Total Payroll Related Expen	293,572	336,154	278,790	247,127	31,663	836,371	876,853	(40,482)
44									
45	Total Salaries & Payroll Expe	669,519	758,297	818,743	692,272	126,470	2,456,229	2,120,088	336,140
46									

SEIU Local 521
Financial Statement
For the month of May 2007

	B	J	M	O	P	Q	AQ	AR	AS
		Mar	Apr		May			YTD - Three months	
		Actual	Actual	Budget	Actual	better/(worse)	Budget	Actual	better/(worse)
1									
2									
47									
48	MISCELLANEOUS								
49	Agency Fee/Assoc. Exp.	11,000	11,000	11,000	11,000	-	33,000	33,000	-
50	Capital Fund Expense	1,000	1,000	1,000	1,000	-	3,000	3,000	-
51	Admin exp share w. chapter	375	40	1,000	302	698	3,000	717	2,283
52	Free Life insurance to members	(SCR, MRY & E	1,200	6,800	2,454	4,346	20,400	3,654	16,746
53	Chapter Fund Reimbursement	3,685	3,074	4,000	3,119	881	12,000	9,878	2,122
54	Dodge Scholarship	1,500	1,500	1,500	1,500	-	4,500	4,500	-
55	Good & Welfare			3,600		3,600	10,800	-	10,800
56	UHW & L1877 ADMIN EXPENSE	181,638	189,849	-	14,356	(14,356)	-	385,843	(385,843)
57	Total Miscellaneous	199,198	207,663	28,900	33,732	(4,832)	86,700	440,593	(353,893)
58									
59	ARBITRATIONS & LEGAL								
60	Arbitrations Fees	7,545	3,909	3,100	1,781	1,319	9,300	13,235	(3,935)
61	Retainer	13,262	8,995	21,740	21,791	(51)	65,220	44,049	21,171
62	Court Costs			3,300	1,215	2,085	9,900	1,215	8,685
63	Miscellaneous			500		500	1,500	-	1,500
64	Total Arbitrations & Legal	20,807	12,905	28,640	24,787	3,853	85,920	58,499	27,421
65									
66	FACILITIES								
67	Rent-SJC + 535SJC	32,716	37,673	34,922	37,731	(2,809)	104,766	108,120	(3,354)
68	Rent-RWC	6,114	6,114	6,114	6,130	(16)	18,342	18,358	(16)
69	Rent-Bakersfield apartment			1,525		1,525	4,575	-	4,575
70	Rent-Fresno	6,853	273	6,900	11,793	(4,893)	20,700	18,919	1,781
71	Rent-Santa Cruz, Watsonville &	750	7,383	7,333	7,329	4	21,999	15,462	6,537
72	Rent-Visalia	2,157	661	700	925	(225)	2,100	3,743	(1,643)
73	Utilities	13,135	5,504	18,200	18,083	117	54,600	36,723	17,877
74	Kitchen Sundries	1,716	2550.93	3,500	2,153	1,347	10,500	6,420	4,080
75	Gen. Liab. Ins. & Property Tax	5,417	5,417	18,033	5,433	12,600	54,099	16,268	37,831
76	Building Maintenance/Security/	7,948	11,783	9,000	8,608	392	27,000	28,339	(1,339)
77	Total Admin - Facilities	76,806	77,359	106,227	98,187	8,040	318,681	252,351	66,330
78									
79	ADMINISTRATIVE - OFFICES								
80	Audit/Acct. Fees	910	901	10,000	13,025	(3,025)	30,000	14,836	15,164
81	Subscriptions		171	500	647	(147)	1,500	818	682
82	Office Sundries	8,184	4,355	7,000	13,187	(6,187)	21,000	25,726	(4,726)
83	Office Equipment Leases	36,592	44,816	40,000	25,726	14,274	120,000	107,134	12,866
84	Equipment Maintenance & Rep	3,628	9,575	8,000	5,919	2,081	24,000	19,123	4,877
85	Contributions			500	283	217	1,500	283	1,217
86	Research Material & Data			2,000		2,000	6,000	-	6,000
87	Dues Implementation			600		600	1,800	-	1,800
88	Computer Database Services	881	2,482	10,000	777	9,223	30,000	4,141	25,859
89	Miscellaneous		750	1,000		1,000	3,000	750	2,250
90	Total Admin - Offices	50,195	63,051	79,600	59,564	20,036	238,800	172,811	65,989

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SEIU Local 521
Financial Statement
For the month of May 2007

	B	J	M	O	P	Q	AQ	AR	AS
		Mar	Apr		May		YTD - Three months		
		Actual	Actual	Budget	Actual	better/(worse)	Budget	Actual	better/(worse)
1									
2									
92	COMMUNICATIONS								
93	Printing	12,836	11,799	8,000	7,881	119	24,000	32,516	(8,516)
94	Paper	2,445	1,244	4,000	2,404	1,596	12,000	6,092	5,908
95	Website/Station/communication	719	799	1,500	453	1,047	4,500	1,971	2,529
96	Telephone & Internet	13,223	11,744	18,000	13,188	4,812	54,000	38,155	15,845
97	Postage	7,775	3,484	6,000	7,296	(1,296)	18,000	18,555	(555)
98	Professional Fees/Translations		55	1,000	120	880	3,000	175	2,825
99	Total Communications	36,998	29,125	38,500	31,342	7,158	115,500	97,465	18,035
100									
101	CONFERENCES/MILEAGE								
102	Staff-Misc. Conf/Seminar			2,000		2,000	6,000	-	6,000
103	Exec. Board-Conferences			1,000		1,000	3,000	-	3,000
104	International Convention			-		-	-	-	-
105	Industries & Members Conferences			1,000	1,500	(500)	3,000	1,500	1,500
106	Misc. Members-Reimbursed			500		500	1,500	-	1,500
107	Total Conferences/Mileage	-	-	4,500	1,500	3,000	13,500	1,500	12,000
108									
109	STAFF MEETING & TRAINING								
110	Director Training			2,000	1,845	155	6,000	1,845	4,155
111	Staff - representation & political	4,360	7,456	10,000	662	9,338	30,000	12,478	17,522
112	Clerical Staff		1,392	800	259	541	2,400	1,651	749
113	Executive Staff	2,742		800	886	(86)	2,400	3,627	(1,227)
114	Tuition Reim.-Internal Organizers			500		500	1,500	-	1,500
115	Tuition Reim.-OPEIU			500		500	1,500	-	1,500
116	Total Staff Training	7,102	8,848	14,600	3,652	10,948	43,800	19,602	24,198
117									
118	EDUCATION & TRAINING								
119	Steward & Chief Steward Training			300		300	900	-	900
120	Executive Board			500		500	1,500	-	1,500
121	Education & Training Committee Meeting & Materials			4,000		4,000	12,000	-	12,000
122	Industry Training Events			2,000		2,000	6,000	-	6,000
123	Total Education & Training	-	-	6,800	-	6,800	20,400	-	20,400
124									
125	POLITICAL/SOCIAL INVOLVEMENT								
126	Candidates Account (\$0.10 per	7,930	9,412	6,000	9,579	(3,579)	18,000	26,921	(8,921)
127	Issues Account			-		-	-	-	-
128	Legal			4,000		4,000	12,000	-	12,000
129	Committee Meetings	91	86	300	68	232	900	245	655
130	Conferences			2,000		2,000	6,000	-	6,000
131	Electoral Staff/ Activity			300		300	900	-	900
132	Polls & Surveys			500		500	1,500	-	1,500
133	Special Printing			200		200	600	-	600
134	Subscriptions			25		25	75	-	75
135	Total Political/Social Invol	8,021	9,498	13,325	9,647	3,678	39,975	27,166	12,809

SEIU Local 521
Financial Statement
For the month of May 2007

	B	J	M	O	P	Q	AQ	AR	AS
		Mar	Apr		May		YTD - Three months		
		Actual	Actual	Budget	Actual	better/(worse)	Budget	Actual	better/(worse)
1									
2									
136									
137	SOCIAL & ECONOMIC JUSTICE								
138	Committee Meetings			300	22	278	900	22	878
139	Conferences	778		300		300	900	778	122
140	Contributions/Solidarity	500		200		200	600	500	100
141	*** \$1.00 PER MEMBER	4,588	312	3,125	1,182	1,943	9,375	6,082	3,293
142	Total Social & Economic J	5,867	312	3,925	1,204	2,721	11,775	7,382	4,393
143									
144	MEMBER INVOLVEMENT								
145	Memorabilia/Give away Membe	927	20,716	5,000	17,280	(12,280)	15,000	38,922	(23,922)
146	Awards/Recognition	500		300		300	900	500	400
147	Planning & Event Prep			300		300	900	-	900
148	Ex Board / Advisory Board Reimbursement			500		500	1,500	-	1,500
149	Rally Rental & Bus		3,570	4,000	1,945	2,055	12,000	5,515	6,485
150	Member Reimbursement/Lost time		283	5,000	831	4,169	15,000	1,114	13,886
151	Transportation & Vehicle Exper	134		500		500	1,500	134	1,366
152	Total Member Involvement	1,561	24,569	15,600	20,056	(4,456)	46,800	46,186	614
153									
154	NEGOTIATIONS								
155	Printing Contracts	30,237		5,000		5,000	15,000	30,237	(15,237)
156	Meetings & Supplies	445	1,690	5,000	1,087	3,913	15,000	3,222	11,778
157	Negotiations Committee Food			5,000		5,000	15,000	-	15,000
158	Strike Preparations			1,000		1,000	3,000	-	3,000
159	Automatic Strike Fund Transfer (\$0.50 per member/mom)			18,750		18,750	56,250	-	56,250
160	Total Negotiations	30,682	1,690	34,750	1,087	33,663	104,250	33,459	70,791
161									
162	MEETINGS & EVENTS								
163	Executive Board Meetings			2,000	108	1,892	6,000	108	5,892
164	Steward/Council meetings	294	99	4,500	5,484	(984)	13,500	5,877	7,623
165	521 Party & other events	2,595	5,886	7,000	22,719	(15,719)	21,000	31,200	(10,200)
166	Advisory Board Meetings	15,570		10,000	-	10,000	30,000	15,570	14,430
167	Miscellaneous			200		200	600	-	600
168	Total Meetings & Events	18,459	5,985	23,700	28,311	(4,611)	71,100	52,755	18,345
169									

SEIU Local 521
Financial Statement
For the month of May 2007

	B	J	M	O	P	Q	AQ	AR	AS
		Mar	Apr		May		YTD - Three months		
		Actual	Actual	Budget	Actual	better/(worse)	Budget	Actual	better/(worse)
1									
2									
170	REPRESENTATIVE DUES								
171	SEIU \$7.65 ea	571,918	386,333	430,848	397,907	32,941	1,292,544	1,356,158	(63,614)
172	SEIU Unity Fund \$5.00ea	347,500	238,740	266,200	247,290	18,910	798,600	833,530	(34,930)
173	SEIU Retirees \$1.00ea	-	-	60	-	60	180	-	180
174	SEIU Associate Members-1.00	-	-	12	-	12	36	-	36
175	SEIU/ State Council-\$2.53ea	197,089	126,639	142,490	130,547	11,942	427,469	454,276	(26,807)
176	So Bay CLC \$0.55ea	20,898	11,230	12,100	11,172	928	36,300	43,300	(7,000)
177	SMCO CLC \$0.60ea	4,965	2,571	2,838	2,440	398	8,514	9,976	(1,462)
178	Fresno CLC \$0.35ea	510	1,619	2,800	1,950	851	8,400	4,079	4,321
179	Bakersfield CLC \$0.25ea	-	1,585	1,625	1,753	(128)	4,875	3,338	1,537
180	Monterey & Santa Cruz LC \$0.4	1,880	2,648	3,300	3,605	(305)	9,900	8,133	1,767
181	CA Labor Fed 50% X .47ea	13,261	8,901	9,048	9,167	(120)	27,143	31,329	(4,186)
182	Building Trades-SMCO	250	250	250	250	-	750	750	-
183	Total Representative Dues	1,158,271	780,517	871,570	806,081	65,489	2,614,710	2,744,869	(130,159)
184									
185	TOTAL EXPENSES	2,584,563	2,280,894	2,390,457	2,112,499	277,958	7,171,372	6,977,955	193,416
186									
187	TOTAL INCOME LESS TOTAL	(642,897)	(283,919)	(2,500)	559,817	562,316	(7,500)	(366,999)	(359,500)
188									
189	VOLUNTARY TRANSFERS								
190	Building Funds	-	-	-	-	-	-	-	-
191	Automatic Legal Defense Fund	9,375	9,375	9,375	9,375	-	28,125	28,125	-
192	Strike Fund	-	-	-	-	-	-	-	-
193	Total Transfers	9,375	9,375	9,375	9,375	-	28,125	28,125	-
194	TOTAL INCOME LESS EXPEN	(652,272)	(293,294)	(11,875)	550,442	562,316	(35,625)	(395,124)	(359,500)

EXHIBIT N

SEIU Local 521
Financial Statement
For the month of June 2007

B	J	M	P	R	S	T	AQ	AR	AS
	Mar	Apr	May		Jun			YTD - Four months	
	Actual	Actual	Actual	Budget	Actual	better/(worse)	Budget	Actual	better/(worse)
1	1,937,972	1,960,198	2,661,404	2,376,957	2,182,557	(194,400)	9,507,829	8,742,130	(765,699)
2									
3									
4									
5	-	6,158	7,601	2,400	6,986	4,586	9,600	20,745	11,145
6	-	25,000	-	5,000	-	(5,000)	20,000	25,000	5,000
7	3,311	3,311	3,311	3,600	4,626	1,026	14,400	14,559	159
8	383	2,308	-	-	47	47	-	2,738	2,738
9	3,694	36,777	10,912	11,000	11,659	659	44,000	63,042	19,042
10									
11	1,941,666	1,996,975	2,672,316	2,387,957	2,194,216	(193,741)	9,551,829	8,805,173	(746,657)
12									
13									
14									
15	301,077	301,077	301,077	301,077	301,077	(0)	1,204,310	1,204,309	(0)
16									
17									
18									
19	29,293	34,472	34,472	37,345	34,472	2,873	149,380	132,710	16,670
20	15,732	18,304	32,391	37,674	32,264	5,410	150,694	98,691	52,004
21	63,466	65,828	65,581	83,896	71,063	12,833	335,584	265,939	69,645
22	179,499	207,013	218,022	252,575	248,018	4,557	1,010,301	852,552	157,749
23	58,721	67,066	54,179	68,579	55,436	13,142	274,315	235,403	38,912
24	2,669	3,321	3,080	3,337	3,362	(26)	13,346	12,433	914
25	17,152	21,396	22,889	23,217	23,847	(631)	92,866	85,284	7,582
26	2,889	3,440	5,190	5,000	2,964	2,036	20,000	14,483	5,517
27	915	645	4,275	3,000	5,742	(2,742)	12,000	11,577	423
28	5,611	656	5,067	25,331	5,921	19,410	101,324	17,255	84,069
29	375,947	422,143	445,146	539,953	483,091	56,862	2,159,811	1,726,326	433,484
30									
31	102,326	28,766	58,608	70,927	61,103	9,824	283,708	250,803	32,905
32	30,413	57,561	26,190	50,662	29,002	21,661	202,649	143,165	59,484
33	951	3,012	5,877	1,500	434	1,066	6,000	10,275	(4,275)
34	5,977	9,614	3,634	3,000	1,756	1,244	12,000	20,981	(8,981)
35	2,209	1,049	509	10,392	3,639	6,753	41,568	7,405	34,163
36	15,982	17,963	17,106	21,475	19,717	1,758	85,900	70,768	15,132
37	3,040	2,298	2,431	7,500	2,457	5,043	30,000	10,226	19,774
38	3,410	7,969	2,334	5,701	3,236	2,464	22,802	16,950	5,852
39	10,400	10,400	10,400	10,400	10,400	-	41,600	41,600	-
40	94,218	188,515	111,093	163,718	114,959	48,758	654,871	508,785	146,085
41	23,737	7,613	7,613	20,698	12,613	8,085	82,794	51,576	31,218
42	909	1,394	1,331	1,000	1,175	(175)	4,000	4,810	(810)
43	293,572	336,154	247,127	278,790	260,491	(18,299)	1,115,161	1,137,344	(22,183)
44									
45	669,519	758,297	692,272	818,743	743,582	75,161	1,637,486	1,427,816	209,670

SEIU Local 521
Financial Statement
For the month of June 2007

	B	J	M	P	R	S	T	AQ	AR	AS
		Mar	Apr	May		Jun			YTD - Four months	
		Actual	Actual	Actual	Budget	Actual	better/(worse)	Budget	Actual	better/(worse)
1										
2										
46										
47										
48	MISCELLANEOUS									
49	Agency Fee/Assoc. Exp.	11,000	11,000	11,000	11,000	11,000	-	44,000	44,000	-
50	Capital Fund Expense	1,000	1,000	1,000	1,000	1,000	-	4,000	4,000	-
51	Admin exp share w. chapter	375	40	302	1,000	1,000	1,000	4,000	717	3,283
52	Free Life insurance to members (SCR, MRY & E		1,200	2,454	6,800	1,227	5,573	27,200	4,881	22,319
53	Chapter Fund Reimbursement	3,685	3,074	3,119	4,000	3,893	107	16,000	13,770	2,230
54	Dodge Scholarship	1,500	1,500	1,500	1,500	1,500	-	6,000	6,000	-
55	Good & Welfare				3,600		3,600	14,400	-	14,400
56	UHW & L1877 ADMIN EXPENSE	181,638	189,849	14,356	-	39,412	(39,412)	-	425,256	(425,256)
57	Total Miscellaneous	199,198	207,663	33,732	28,900	58,032	(29,132)	115,600	498,625	(383,025)
58										
59	ARBITRATIONS & LEGAL									
60	Arbitrations Fees	7,545	3,909	1,781	3,100	8,374	(5,274)	12,400	21,609	(9,209)
61	Retainer	13,262	8,995	21,791	21,740	11,237	10,503	86,960	55,286	31,674
62	Court Costs			1,215	3,300		3,300	13,200	1,215	11,985
63	Miscellaneous				500		500	2,000	-	2,000
64	Total Arbitrations & Legal	20,807	12,905	24,787	28,640	19,611	9,029	114,560	78,110	36,450
65										
66	FACILITIES									
67	Rent-SJC + 535SJC	32,716	37,673	37,731	34,922	37,643	(2,721)	139,688	145,763	(6,075)
68	Rent-RWC	6,114	6,114	6,130	6,114	6,130	(16)	24,456	24,488	(32)
69	Rent-Bakersfield apartment				1,525		1,525	6,100	-	6,100
70	Rent-Fresno	6,853	273	11,793	6,900	11,425	(4,525)	27,600	30,344	(2,744)
71	Rent-Santa Cruz, Watsonville &	750	7,383	7,329	7,333	7,329	4	29,332	22,792	6,540
72	Rent-Visalia	2,157	661	925	700	661	39	2,800	4,404	(1,604)
73	Utilities	13,135	5,504	18,083	18,200	16,099	2,101	72,800	52,821	19,979
74	Kitchen Sundries	1,716	2550.93	2,153	3,500	2,328	1,172	14,000	8,747	5,253
75	Gen. Liab. Ins. & Property Tax (	5,417	5,417	5,433	18,033	8,089	9,943	72,131	24,357	47,775
76	Building Maintenance/Security/	7,948	11,783	8,608	9,000	17,551	(8,551)	36,000	45,889	(9,889)
77	Total Admin - Facilities	76,806	77,359	98,187	106,227	107,255	(1,028)	424,907	359,606	65,301
78										
79	ADMINISTRATIVE - OFFICES									
80	Audit/Acct. Fees	910	901	13,025	10,000	1,471	8,529	40,000	16,307	23,693
81	Subscriptions		171	647	500	-	500	2,000	818	1,182
82	Office Sundries	8,184	4,355	13,187	7,000	5,770	1,230	28,000	31,496	(3,496)
83	Office Equipment Leases	36,592	44,816	25,726	40,000	43,588	(3,588)	160,000	150,722	9,278
84	Equipment Maintenance & Rep	3,628	9,575	5,919	8,000	6,270	1,730	32,000	25,392	6,608
85	Contributions			283	500		500	2,000	283	1,717
86	Research Material & Data				2,000		2,000	8,000	-	8,000
87	Dues Implementation				600		600	2,400	-	2,400
88	Computer Database Services	881	2,482	777	10,000	777	9,223	40,000	4,918	35,082

SEIU Local 521
Financial Statement
For the month of June 2007

	B	J	M	P	R	S	T	AQ	AR	AS
		Mar	Apr	May		Jun			YTD - Four months	
		Actual	Actual	Actual	Budget	Actual	better/(worse)	Budget	Actual	better/(worse)
1							1,000	4,000	750	3,250
2	Miscellaneous		750							
89	Total Admin - Offices	50,195	63,051	59,564	79,600	57,876	21,724	318,400	230,687	87,713
90										
91										
92	COMMUNICATIONS									
93	Printing	12,836	11,799	7,881	8,000	11,160	(3,160)	32,000	43,677	(11,677)
94	Paper	2,445	1,244	2,404	4,000	3,609	391	16,000	9,702	6,298
95	Website/Station/communication	719	799	453	1,500	310	1,190	6,000	2,281	3,719
96	Telephone & Internet	13,223	11,744	13,188	18,000	18,048	(48)	72,000	56,203	15,797
97	Postage	7,775	3,484	7,296	6,000	2,642	3,359	24,000	21,196	2,804
98	Professional Fees/Translations		55	120	1,000	195	805	4,000	370	3,630
99	Total Communications	36,998	29,125	31,342	38,500	35,964	2,536	154,000	133,429	20,571
100										
101	CONFERENCES/MILEAGE									
102	Staff-Misc. Conf/Seminar				2,000	175	1,825	8,000	175	7,825
103	Exec. Board-Conferences				1,000		1,000	4,000	-	4,000
104	International Convention				-		-	-	-	-
105	Industries & Members Conferences			1,500	1,000	95	905	4,000	1,595	2,405
106	Misc. Members-Reimbursed				500	604	(104)	2,000	604	1,396
107	Total Conferences/Mileage	-	-	1,500	4,500	874	3,626	18,000	2,374	15,626
108										
109	STAFF MEETING & TRAINING									
110	Director Training			1,845	2,000		2,000	8,000	1,845	6,155
111	Staff - representation & political	4,360	7,456	662	10,000		10,000	40,000	12,478	27,522
112	Clerical Staff		1,392	259	800	323	477	3,200	1,975	1,226
113	Executive Staff	2,742		886	800	1,030	(230)	3,200	4,657	(1,457)
114	Tuition Reim.-Internal Organizers				500		500	2,000	-	2,000
115	Tuition Reim.-OPEIU				500		500	2,000	-	2,000
116	Total Staff Training	7,102	8,848	3,652	14,600	1,354	13,246	58,400	20,955	37,445
117										
118	EDUCATION & TRAINING									
119	Steward & Chief Steward Training				300		300	1,200	-	1,200
120	Executive Board				500		500	2,000	-	2,000
121	Education & Training Committee Meeting & Materials				4,000	29	3,971	16,000	29	15,971
122	Industry Training Events				2,000		2,000	8,000	-	8,000
123	Total Education & Training	-	-	-	6,800	29	6,771	27,200	29	27,171
124										
125	POLITICAL/SOCIAL INVOLVEMENT									
126	Candidates Account (\$0.10 per	7,930	9,412	9,579	6,000	9,902	(3,902)	24,000	36,823	(12,823)
127	Issues Account				-		-	-	-	-
128	Legal				4,000		4,000	16,000	-	16,000
129	Committee Meetings	91	86	68	300	1,298	(998)	1,200	1,542	(342)
130	Conferences				2,000		2,000	8,000	-	8,000
131	Electoral Staff/ Activity				300		300	1,200	-	1,200
132	Polls & Surveys				500		500	2,000	-	2,000

SEIU Local 521
Financial Statement
For the month of June 2007

	B	J Mar	M Apr	P May	R	S Jun	T	AQ	AR	AS
		Actual	Actual	Actual	Budget	Actual	better/(worse)	Budget	Actual	better/(worse)
1										
2	Special Printing				200		200	800	-	800
133	Subscriptions				25		25	100	-	100
134	Total Political/Social Invol	8,021	9,498	9,647	13,325	11,199	2,126	53,300	38,365	14,935
135										
136										
137	SOCIAL & ECONOMIC JUSTICE									
138	Committee Meetings			22	300	524	(224)	1,200	546	654
139	Conferences	778			300		300	1,200	778	422
140	Contributions/Solidarity	500			200	350	(150)	800	850	(50)
141	*** \$1.00 PER MEMBER	4,588	312	1,182	3,125		3,125	12,500	6,082	6,418
142	Total Social & Economic J	5,867	312	1,204	3,925	874	3,051	15,700	8,256	7,444
143										
144	MEMBER INVOLVEMENT									
145	Memorabilia/Give away Membe	927	20,716	17,280	5,000	8,235	(3,235)	20,000	47,157	(27,157)
146	Awards/Recognition	500			300		300	1,200	500	700
147	Planning & Event Prep				300		300	1,200	-	1,200
148	Ex Board / Advisory Board Reimbursement				500		500	2,000	-	2,000
149	Rally Rental & Bus		3,570	1,945	4,000	760	3,240	16,000	6,275	9,725
150	Member Reimbursement/Lost time		283	831	5,000		5,000	20,000	1,114	18,886
151	Transportation & Vehicle Exper	134			500		500	2,000	134	1,866
152	Total Member Involvement	1,561	24,569	20,056	15,600	8,995	6,605	62,400	55,181	7,219
153										
154	NEGOTIATIONS									
155	Printing Contracts	30,237			5,000		5,000	20,000	30,237	(10,237)
156	Meetings & Supplies	445	1,690	1,087	5,000	2,287	2,713	20,000	5,509	14,491
157	Negotiations Committee Food				5,000		5,000	20,000	-	20,000
158	Strike Preparations				1,000		1,000	4,000	-	4,000
159	Automatic Strike Fund Transfer (\$0.50 per member/mom)				18,750		18,750	75,000	-	75,000
160	Total Negotiations	30,682	1,690	1,087	34,750	2,287	32,463	139,000	35,746	103,254
161										
162	MEETINGS & EVENTS									
163	Executive Board Meetings			108	2,000		2,000	8,000	108	7,892
164	Steward/Council meetings	294	99	5,484	4,500	4,961	(461)	18,000	10,839	7,161
165	521 Party & other events	2,595	5,886	22,719	7,000	1,565	5,435	28,000	32,765	(4,765)
166	Advisory Board Meetings	15,570		-	10,000		10,000	40,000	15,570	24,430
167	Miscellaneous				200		200	800	-	800
168	Total Meetings & Events	18,459	5,985	28,311	23,700	6,526	17,174	94,800	59,281	35,519
169										

SEIU Local 521
Financial Statement
For the month of June 2007

	B	J Mar	M Apr	P May		R	S Jun		T	AQ YTD - Four months		AS
				Actual	Budget		Actual	better/(worse)		Budget	Actual	
1		Actual										
2												
170	REPRESENTATIVE DUES											
171	SEIU \$7.65 ea	571,918	386,333	397,907	430,848		412,366	18,482		1,723,392	1,768,523	(45,131)
172	SEIU Unity Fund \$5.00ea	347,500	238,740	247,290	266,200		254,750	11,450		1,064,800	1,088,280	(23,480)
173	SEIU Retirees \$1.00ea	-	-	-	60		-	60		240	-	240
174	SEIU Associate Members-1.00	-	-	-	12		-	12		48	-	48
175	SEIU/ State Council-\$2.53ea	197,089	126,639	130,547	142,490		157,157	(14,667)		569,958	611,433	(41,474)
176	So Bay CLC \$0.55ea	20,898	11,230	11,172	12,100		16,311	(4,211)		48,400	59,611	(11,211)
177	SMCO CLC \$0.60ea	4,965	2,571	2,440	2,838		2,629	209		11,352	12,605	(1,253)
178	Fresno CLC \$0.35ea	510	1,619	1,950	2,800		2,237	564		11,200	6,315	4,885
179	Bakersfield CLC \$0.25ea	-	1,585	1,753	1,625		1,854	(229)		6,500	5,193	1,308
180	Monterey & Santa Cruz LC \$0.1	1,880	2,648	3,605	3,300		3,600	(300)		13,200	11,733	1,467
181	CA Labor Fed 50% X .47ea	13,261	8,901	9,167	9,048		9,501	(453)		36,190	40,829	(4,639)
182	Building Trades-SMCO	250	250	250	250		275	(25)		1,000	1,025	(25)
183	Total Representative Dues	1,158,271	780,517	806,081	871,570		860,678	10,892		3,486,280	3,605,547	(119,266)
184												
185	TOTAL EXPENSES	2,584,563	2,280,894	2,112,499	2,390,457		2,216,213	174,243		7,924,343	7,758,314	166,028
186												
187	TOTAL INCOME LESS TOTAL	(642,897)	(283,919)	559,817	(2,500)		(21,997)	(19,498)		(10,000)	(388,996)	(378,998)
188												
189	VOLUNTARY TRANSFERS											
190	Building Funds	-	-	-	-		-	-		-	-	-
191	Automatic Legal Defense Fund	9,375	9,375	9,375	9,375		9,375	-		37,500	37,500	-
192	Strike Fund	-	-	-	-		-	-		-	-	-
193	Total Transfers	9,375	9,375	9,375	9,375		9,375	-		37,500	37,500	-
194	TOTAL INCOME LESS EXPEN	(652,272)	(293,294)	550,442	(11,875)		(31,372)	(19,498)		(47,500)	(426,496)	(378,998)

EXHIBIT O

SEIU Local 521
Financial Statement
For the month of August 2007

	B	J	M	P	S	V	X	Y	Z	AQ	AR	AS
		Mar	Apr	May	Jun	Jul		Aug			YTD - Six months	
		Actual	Actual	Actual	Actual	Actual	Budget	Actual	better/(worse)	Budget	Actual	better/(worse)
1		1,937,972	1,960,198	2,661,404	2,182,557	2,224,147	2,376,957	2,412,425	35,468	14,261,744	13,378,703	(883,041)
2	TOTAL DUES RECEIPTS											
3	OTHER INCOME											
4	Interest & Dividends	-	6,158	7,601	6,986	7,767	2,400	10,529	8,129	14,400	39,041	24,641
5	SMHSS Administrative Reimb	-	25,000	-	-	-	5,000	-	(5,000)	30,000	25,000	(5,000)
6	Sublease Rent	3,311	3,311	3,311	4,626	3,457	3,600	3,536	(64)	21,600	21,552	(48)
7	Misc. Income	383	2,308	-	47	234	-	15	15	-	2,986	2,986
8	Total Misc. Income	3,694	36,777	10,912	11,659	11,457	11,000	14,081	3,081	66,000	88,580	22,580
9												
10	TOTAL GENERAL FUND INC	1,941,666	1,996,975	2,672,316	2,194,216	2,235,604	2,387,957	2,426,506	38,548	14,327,744	13,467,283	(860,461)
11												
12	GENERAL FUND EXPENSES											
13												
14	ORGANIZING OFFSET	301,077	301,077	301,077	301,077	301,077	301,077	301,077	(0)	1,806,465	1,806,463	1
15												
16	SALARIES											
17	Administrative	29,293	34,472	34,472	34,472	34,472	37,345	50,267	(12,922)	224,069	217,448	6,621
18	Admin Support	15,732	18,304	32,391	32,264	32,224	37,674	54,556	(16,882)	226,041	185,471	40,571
19	Directors	63,466	65,828	65,581	71,063	70,314	83,896	105,810	(21,914)	503,376	442,064	61,312
20	Internal Organizers/Research	179,499	207,013	218,022	248,018	258,140	252,575	413,449	(160,874)	1,515,452	1,524,142	(8,690)
21	Clerical	58,721	67,066	54,179	55,436	60,802	68,579	87,339	(18,761)	411,472	383,544	27,928
22	Facilities	2,669	3,321	3,080	3,362	3,203	3,337	4,878	(1,541)	20,019	20,513	(494)
23	Data Base Services	17,152	21,396	22,889	23,847	23,361	23,217	36,212	(12,996)	139,299	144,858	(5,559)
24	Temp. Internal Organizers/Res	2,889	3,440	5,190	2,964	9,863	5,000	2,615	2,385	30,000	26,961	3,039
25	Temp. Clerical/Support	915	645	4,275	5,742	9,403	3,000	5,993	(2,993)	18,000	26,974	(8,974)
26	Vacation & Comp Time	5,611	656	5,067	5,921	4,294	25,331	13,090	12,241	151,986	34,640	117,347
27	Total Salaries	375,947	422,143	445,146	483,091	506,077	539,953	774,211	(234,258)	3,239,716	3,006,614	233,101
28	PAYROLL RELATED EXPENSES											
29	Pension	102,326	28,766	58,608	61,103	60,615	70,927	96,949	(26,022)	425,562	408,368	17,194
30	Payroll Taxes Expenses	30,413	57,561	26,190	29,002	29,278	50,662	52,793	(2,131)	303,973	225,236	78,737
31	Travel Staff-Admin	951	3,012	5,877	434	3,564	1,500	6,410	(4,910)	9,000	20,249	(11,249)
32	Travel Staff- Internal Organizer	5,977	9,614	3,634	1,756	5,335	3,000	3,757	(757)	18,000	30,073	(12,073)
33	Mileage/Ins. Reimb.-Admin & I	2,209	1,049	509	3,639	3,084	10,392	2,164	8,228	62,352	12,654	49,698
34	Mileage/Ins. Reimb.-Internal O	15,982	17,963	17,106	19,717	22,226	21,475	19,248	2,227	128,850	112,242	16,608
35	Telephone Reimbursement	3,040	2,298	2,431	2,457	4,085	7,500	4,349	3,151	45,000	18,660	26,340
36	Retiree Health Exp	3,410	7,969	2,334	3,236	7,085	5,701	6,569	(868)	34,203	30,603	3,600
37	Retire Benefit Trust Fund	10,400	10,400	10,400	10,400	10,400	10,400	10,400	-	62,400	62,400	-
38	Benefits(Health, Dental, Vision	94,218	188,515	111,093	114,959	144,501	163,718	89,661	74,057	982,306	742,947	239,359
39	Workers Comp Insurance	23,737	7,613	7,613	12,613	7,613	20,698	7,613	13,085	124,190	66,802	57,389
40	Recruiting exp	909	1,394	1,331	1,175	1,271	1,000	1,501	(501)	6,000	7,582	(1,582)
41	Vacancy Rate (saving)						(88,182)		(88,182)	(529,095)	-	(529,095)
42	Total Payroll Related Expe	293,572	336,154	247,127	260,491	299,057	278,790	301,414	(22,624)	1,672,741	1,737,815	(65,074)
43												
44	Total Salaries & Payroll Expe	669,519	758,297	692,272	743,582	805,134	818,743	1,075,625	(256,882)	4,912,457	4,744,429	168,028
45												
46												

SEIU Local 521
Financial Statement
For the month of August 2007

	B	J	M	P	S	V	X	Y	Z	AQ	AR	AS
		Mar	Apr	May	Jun	Jul		Aug				
		Actual	Actual	Actual	Actual	Actual	Budget	Actual	better/(worse)	Budget	Actual	better/(worse)
1												
2												
47												
48	MISCELLANEOUS											
49	Agency Fee/Assoc. Exp.	11,000	11,000	11,000	11,000	11,000	11,000	11,000	-	66,000	66,000	-
50	Capital Fund Expense	1,000	1,000	1,000	1,000	1,000	1,000	1,000	-	6,000	6,000	-
51	Admin exp share w. chapter	375	40	302			1,000	1,000	1,000	6,000	717	5,283
52	Free Life insurance to members (SCR, MRY &	3,685	1,200	2,454	1,227	1,026	6,800	1,227	5,573	40,800	7,135	33,665
53	Chapter Fund Reimbursement	1,500	3,074	3,119	3,893	4,249	4,000	4,191	(191)	24,000	22,210	1,790
54	Dodge Scholarship		1,500	1,500	1,500	1,500	1,500	1,500	-	9,000	9,000	-
55	Good & Welfare						3,600	262	3,338	21,600	262	21,338
56	UHW & L1877 ADMIN EXPEN	181,638	189,849	14,356	39,412	167,420	-	21,011	(21,011)	-	613,687	(613,687)
57	Hanford - Shawhan Expenses	-	-	-	-	10,000	-	10,000	(10,000)	-	20,000	(20,000)
58	Ex-Board Stipend	-	-	-	-	2,200	-	2,200	(2,200)	-	4,400	(4,400)
59	Total Miscellaneous	199,198	207,663	33,732	58,032	198,395	28,900	52,391	(23,491)	173,400	749,411	(576,011)
60												
61	ARBITRATIONS & LEGAL											
62	Arbitrations Fees	7,545	3,909	1,781	8,374	7,911	3,100	1,758	1,342	18,600	31,279	(12,679)
63	Retainer	13,262	8,995	21,791	11,237	27,134	21,740	20,117	1,623	130,440	102,537	27,903
64	Court Costs			1,215			3,300		3,300	19,800	1,215	18,585
65	Miscellaneous						500		500	3,000	-	3,000
66	Total Arbitrations & Legal	20,807	12,905	24,787	19,611	35,045	28,640	21,875	6,765	171,840	135,030	36,810
67												
68	FACILITIES											
69	Rent-SJC + 5355JC	32,716	37,673	37,731	37,643	37,597	34,922	32,827	2,095	209,532	216,187	(6,655)
70	Rent-RWC	6,114	6,114	6,130	6,130	6,130	6,114	6,330	(216)	36,684	36,948	(264)
71	Rent-Bakersfield apartment						1,525		1,525	9,150	-	9,150
72	Rent-Fresno	6,853	273	11,793	11,425	11,402	6,900	6,853	47	41,400	48,600	(7,200)
73	Rent-Santa Cruz, Watsonville &	750	7,383	7,329	7,329	7,329	7,333	7,329	4	43,998	37,450	6,548
74	Rent-Visalia	2,157	661	925	661	661	700	800	(100)	4,200	5,865	(1,665)
75	Utilities	13,135	5,504	18,083	16,099	15,341	18,200	17,166	1,034	109,200	85,329	23,871
76	Kitchen Sundries	1,716	2,550.93	2,153	2,328	(1,337)	3,500	5,432	(1,932)	21,000	12,843	8,157
77	Gen. Liab. Ins. & Property Tax	5,417	5,417	5,433	8,089	9,216	18,033	5,417	12,616	108,197	38,990	69,207
78	Building Maintenance/Security/	7,948	11,783	8,608	17,551	13,286	9,000	14,082	(5,082)	54,000	73,257	(19,257)
79	Total Admin - Facilities	76,806	77,359	98,187	107,255	99,626	106,227	96,237	9,990	637,361	555,468	81,893
80												
81	ADMINISTRATIVE - OFFICES											
82	Audit/Acct. Fees	910	901	13,025	1,471	1,145	10,000	13,752	(3,752)	60,000	31,204	28,796
83	Subscriptions		171	647	-	115	500	226	274	3,000	1,159	1,841
84	Office Sundries	8,184	4,355	13,187	5,770	9,429	7,000	7,008	(8)	42,000	47,933	(5,933)
85	Office Equipment Leases	36,592	44,816	25,726	43,588	32,548	40,000	28,896	11,104	240,000	212,166	27,834
86	Equipment Maintenance & Ref	3,628	9,575	5,919	6,270	5,751	8,000	5,384	2,616	48,000	36,527	11,473
87	Contributions			283		1,000	500		500	3,000	1,283	1,717
88	Research Material & Data						2,000		2,000	12,000	-	12,000
89	Dues Implementation						600		600	3,600	-	3,600
90	Computer Database Services	881	2,482	777	777	324	10,000	52	9,948	60,000	5,294	54,706

SEIU Local 521
Financial Statement
For the month of August 2007

	B	J	M	P	S	V	X	Y	Z	AQ	AR	AS
		Mar	Apr	May	Jun	Jul		Aug		YTD - Six months		
		Actual	Actual	Actual	Actual	Actual	Budget	Actual	better/(worse)	Budget	Actual	better/(worse)
1												
2												
91	Miscellaneous		750				1,000	0	1,000	6,000	750	5,250
92	Total Admin - Offices	50,195	63,051	59,564	57,876	50,312	79,600	55,318	24,282	477,600	336,316	141,284
93												
94	COMMUNICATIONS											
95	Printing	12,836	11,799	7,881	11,160	3,342	8,000	1,787	6,213	48,000	48,806	(806)
96	Paper	2,445	1,244	2,404	3,609	2,473	4,000	411	3,589	24,000	12,585	11,415
97	Website/Station/communication	719	799	453	310	251	1,500	303	1,197	9,000	2,835	6,165
98	Telephone & Internet	13,223	11,744	13,188	18,048	11,957	18,000	12,207	5,793	108,000	80,367	27,633
99	Postage	7,775	3,484	7,296	2,642	8,675	6,000	8,709	(2,709)	36,000	38,580	(2,580)
100	Professional Fees/Translations		55	120	195		1,000		1,000	6,000	370	5,630
101	Total Communications	36,998	29,125	31,342	35,964	26,698	38,500	23,416	15,084	231,000	183,543	47,457
102												
103	CONFERENCES/MILEAGE											
104	Staff-Misc. Conf/Seminar				175		2,000	575	1,425	12,000	750	11,250
105	Exec. Board-Conferences						1,000		1,000	6,000	-	6,000
106	International Convention						-		-	-	-	-
107	Industries & Members Conferences			1,500	95		1,000		1,000	6,000	1,595	4,405
108	Misc. Members-Reimbursed				604		500		500	3,000	604	2,396
109	Total Conferences/Mileage	-	-	1,500	874	-	4,500	575	3,925	27,000	2,949	24,051
110												
111	STAFF MEETING & TRAINING											
112	Director Training			1,845			2,000		2,000	12,000	1,845	10,155
113	Staff - representation & politica	4,360	7,456	662			10,000	5,076	4,924	60,000	17,555	42,446
114	Clerical Staff		1,392	259	323	177	800	568	232	4,800	2,719	2,081
115	Executive Staff	2,742		886	1,030		800		800	4,800	4,657	143
116	Tuition Reim.-Internal Organizers						500		500	3,000	-	3,000
117	Tuition Reim.-OPEIU						500		500	3,000	-	3,000
118	Total Staff Training	7,102	8,848	3,652	1,354	177	14,600	5,644	8,956	87,600	26,776	60,825
119												
120	EDUCATION & TRAINING											
121	Steward & Chief Steward Training						300		300	1,800	-	1,800
122	Executive Board						500		500	3,000	-	3,000
123	Education & Training Committee Meeting & Materials				29		4,000		4,000	24,000	29	23,971
124	Industry Training Events						2,000		2,000	12,000	-	12,000
125	Total Education & Training	-	-	-	29	-	6,800	-	6,800	40,800	29	40,771
126												
127	POLITICAL/SOCIAL INVOLVEMENT											
128	Candidates Account (\$0.10 per	7,930	9,412	9,579	9,902	4,091	6,000	2,004	3,996	36,000	42,917	(6,917)
129	Issues Account						-	2,003	(2,003)	-	2,003	(2,003)
130	Legal						4,000		4,000	24,000	-	24,000
131	Committee Meetings	91	86	68	1,298	509	300	401	(101)	1,800	1,944	(144)
132	Conferences						2,000		2,000	12,000	509	11,491
133	Electoral Staff/ Activity						300		300	1,800	-	1,800
134	Polls & Surveys					247	500		500	3,000	247	2,753
135	Special Printing						200		200	1,200	-	1,200
136	Subscriptions						25		25	150	-	150

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For the month of August 2007

	B	J	M	P	S	V	X	Y	Z	AQ	AR	AS
		Mar	Apr	May	Jun	Jul		Aug		YTD - Six months		
		Actual	Actual	Actual	Actual	Actual	Budget	Actual	better/(worse)	Budget	Actual	better/(worse)
1												
2												
137	Total Political/Social Invol	8,021	9,498	9,647	11,199	4,846	13,325	4,408	8,917	79,950	47,620	32,330
138												
139	SOCIAL & ECONOMIC JUSTICE											
140	Committee Meetings			22	524		300	359	(59)	1,800	904	896
141	Conferences	778					300	193	107	1,800	971	829
142	Contributions/Solidarity	500			350		200	300	(100)	1,200	1,150	50
143	*** \$1.00 PER MEMBER	4,588	312	1,182		2,487	3,125	8,844	(5,719)	18,750	17,413	1,337
144	Total Social & Economic	5,867	312	1,204	874	2,487	3,925	9,696	(5,771)	23,550	20,438	3,112
145												
146	MEMBER INVOLVEMENT											
147	Memorabilia/Give away Membr	927	20,716	17,280	8,235	21,247	5,000	82,260	(77,260)	30,000	150,665	(120,665)
148	Awards/Recognition	500					300		300	1,800	500	1,300
149	Planning & Event Prep						300		300	1,800	-	1,800
150	Ex Board / Advisory Board Reimbursement						500		500	3,000	-	3,000
151	Rally Rental & Bus		3,570	1,945	760		4,000	74	3,926	24,000	6,349	17,651
152	Member Reimbursement/Lost time		283	831		1,414	5,000	569	4,431	30,000	3,097	26,903
153	Transportation & Vehicle Expe	134					500		500	3,000	134	2,866
154	Total Member Involvement	1,561	24,569	20,056	8,995	22,661	15,600	82,903	(67,303)	93,600	160,745	(67,145)
155												
156	NEGOTIATIONS											
157	Printing Contracts	30,237				507	5,000	(447)	5,447	30,000	30,297	(297)
158	Meetings & Supplies	445	1,690	1,087	2,287	2,656	5,000	6,527	(1,527)	30,000	14,692	15,308
159	Negotiations Committee Food						5,000		5,000	30,000	-	30,000
160	Strike Preparations						1,000		1,000	6,000	-	6,000
161	Automatic Strike Fund Transfer (\$0.50 per member/mom)						18,750		18,750	112,500	-	112,500
162	Total Negotiations	30,682	1,690	1,087	2,287	3,163	34,750	6,081	28,669	208,500	44,989	163,511
163												
164	MEETINGS & EVENTS											
165	Executive Board Meetings			108		665	2,000	210	1,790	12,000	982	11,018
166	Steward/Council meetings	294	99	5,484	4,961	4,281	4,500	26	4,474	27,000	15,146	11,854
167	521 Party & other events	2,595	5,886	22,719	1,565		7,000	3,516	3,484	42,000	36,281	5,719
168	Advisory Board Meetings	15,570		-			10,000	2,761	7,239	60,000	18,331	41,669
169	Miscellaneous						200		200	1,200	-	1,200
170	Total Meetings & Events	18,459	5,985	28,311	6,526	4,946	23,700	6,513	17,187	142,200	70,740	71,460
171												

SEIU Local 521
Financial Statement
For the month of August 2007

	B	J	M	P	S	V	X	Y	Z	AQ	AR	AS
		Mar	Apr	May	Jun	Jul		Aug		YTD - Six months		
		Actual	Actual	Actual	Actual	Actual	Budget	Actual	better/(worse)	Budget	Actual	better/(worse)
1												
2												
172	REPRESENTATIVE DUES											
173	SEIU \$7.65 ea	571,918	386,333	397,907	412,366	424,540	430,848	417,300	13,548	2,585,088	2,610,363	(25,275)
174	SEIU Unity Fund \$5.00ea	347,500	238,740	247,290	254,750	265,260	266,200	263,365	2,835	1,597,200	1,616,905	(19,705)
175	SEIU Retirees \$1.00ea	-	-	-	-	-	60	602	(542)	360	602	(242)
176	SEIU Associate Members-1.00	-	-	-	-	-	12	-	12	72	-	72
177	SEIU/ State Council-\$2.53ea	197,089	126,639	130,547	157,157	139,986	142,490	148,237	(5,747)	854,938	899,655	(44,717)
178	So Bay CLC \$0.55ea	20,898	11,230	11,172	16,311	14,002	12,100	16,062	(3,962)	72,600	89,675	(17,075)
179	SMCO CLC \$0.60ea	4,965	2,571	2,440	2,629	2,371	2,838	2,155	683	17,028	17,131	(103)
180	Fresno CLC \$0.35ea	510	1,619	1,950	2,237	1,967	2,800	2,198	602	16,800	10,480	6,320
181	Bakersfield CLC \$0.25ea	-	1,585	1,753	1,854	1,760	1,625	1,808	(183)	9,750	8,760	990
182	Monterey & Santa Cruz LC \$0.	1,880	2,648	3,605	3,600	4,284	3,300	3,989	(689)	19,800	20,006	(206)
183	CA Labor Fed 50% X .47ea	13,261	8,901	9,167	9,501	9,830	9,048	9,720	(673)	54,285	60,379	(6,094)
184	Building Trades-SMCO	250	250	250	275	275	250	275	(25)	1,500	1,575	(75)
185	Total Representative Dues	1,158,271	780,517	806,081	860,678	864,274	871,570	865,710	5,860	5,229,421	5,335,531	(106,110)
186												
187	TOTAL EXPENSES	2,584,563	2,280,894	2,112,499	2,216,213	2,418,840	2,390,457	2,607,469	(217,013)	14,342,744	14,220,478	122,265
188												
189	TOTAL INCOME LESS TOTAL	(642,897)	(283,919)	559,817	(21,997)	(183,236)	(2,500)	(180,964)	(178,465)	(10,000)	(388,996)	(378,998)
190												
191	VOLUNTARY TRANSFERS											
192	Building Funds											
193	Automatic Legal Defense Fund	9,375	9,375	9,375	9,375	9,375	9,375	9,375	-	56,250	56,250	-
194	Strike Fund	-	-	-	-	-	-	-	-	-	-	-
195	Total Transfers	9,375	9,375	9,375	9,375	9,375	9,375	9,375	-	56,250	56,250	-
196	TOTAL INCOME LESS EXPEI	(652,272)	(293,294)	550,442	(31,372)	(192,611)	(11,875)	(190,339)	(178,465)	(47,500)	(426,496)	(378,998)

EXHIBIT P

For the month of September 2007

For the month of September 2007

	B	J	M	P	S	V	Y	AA	AB	AC	AQ	AR	AS
		Mar	Apr	May	Jun	Jul	Aug		Aug	Aug	Aug	Aug	Aug
		Actual	Actual	Actual	Actual	Actual	Actual	Budget	Actual	better/(worse)	Budget	Actual	better/(worse)
1													
2													
3	TOTAL DUES RECEIPTS	1,937,972	1,960,198	2,661,404	2,182,557	2,224,147	2,412,425	2,376,957	2,867,823	490,666	16,838,701	16,246,326	(392,375)
4	OTHER INCOME												
5	Interest & Dividends	-	6,158	7,601	6,986	7,767	10,529	2,400	15,063	12,663	16,800	54,104	37,304
6	SMIHSS Administrative Reim	-	25,000	-	-	-	-	5,000	-	(5,000)	35,000	25,000	(10,000)
7	Sublease Rent	3,311	3,311	3,311	4,826	3,457	3,536	3,600	3,391	(209)	25,200	24,943	(257)
8	Misc. Income	383	2,308	-	47	234	15	-	(378)	(378)	-	2,608	2,608
9	Total Misc. Income	3,694	36,777	10,912	11,659	11,457	14,081	11,000	18,075	7,075	77,000	106,655	29,655
10													
11	TOTAL GENERAL FUND IN	1,941,666	1,996,976	2,672,316	2,194,216	2,235,604	2,426,506	2,387,957	2,886,698	497,741	18,716,701	18,352,981	(362,720)
12													
13	GENERAL FUND EXPENSES												
14													
15	ORGANIZING OFFSET	301,077	301,077	301,077	301,077	301,077	301,077	301,077	301,077	(0)	2,107,542	2,107,540	1
16													
17	SALARIES												
18	Administrative	29,293	34,472	34,472	34,472	34,472	50,267	37,345	30,948	6,397	261,414	248,396	13,018
19	Admin Support	15,732	18,304	32,391	32,264	32,224	54,556	37,674	28,182	9,492	263,715	213,653	50,062
20	Directors	63,466	65,828	65,581	71,063	70,314	105,810	83,896	76,759	7,137	587,272	518,823	68,449
21	Internal Organizers/Research	179,499	207,013	218,022	248,018	258,140	413,449	252,575	275,800	(23,225)	1,768,027	1,739,942	(31,915)
22	Clerical	58,721	67,066	54,179	55,439	60,802	87,339	68,579	59,864	8,714	480,051	443,409	36,642
23	Facilities	2,669	3,321	3,080	3,362	3,203	4,878	3,337	3,369	(32)	23,356	23,882	(526)
24	Data Base Services	17,152	21,396	22,889	23,847	23,361	36,212	23,217	23,837	(621)	162,516	188,695	(6,179)
25	Temp. Internal Organizers/R	2,889	3,440	5,190	2,964	9,863	2,615	5,000	3,223	1,777	35,000	30,184	4,816
26	Temp. Clerical/Support	915	645	4,275	5,742	9,403	5,993	3,000	9,720	(6,720)	21,000	36,694	(15,694)
27	Vacation & Comp Time	5,611	656	5,067	5,921	4,294	13,080	25,331	9,408	15,923	177,318	44,048	133,270
28	Total Salaries	376,947	422,143	446,146	483,091	506,077	774,211	639,963	621,110	18,842	3,779,688	3,527,725	251,944
29	PAYROLL RELATED EXPENSES												
30	Pension	102,326	28,766	58,608	61,103	60,615	96,949	70,927	64,119	6,808	496,489	472,487	24,002
31	Payroll Taxes Expenses	30,413	57,561	26,190	29,002	29,278	52,793	50,862	33,063	17,599	354,635	258,300	96,336
32	Travel Staff-Admin	951	3,012	5,877	434	3,564	6,410	1,500	4,020	(2,520)	10,500	24,269	(13,769)
33	Travel Staff- Internal Organiz	5,977	9,614	3,634	1,766	5,335	3,757	3,000	5,689	(2,689)	21,000	35,762	(14,762)
34	Mileage/Ins. Reimb.-Admin &	2,209	1,049	509	3,639	3,084	2,164	10,392	2,184	8,208	72,744	14,838	57,906
35	Mileage/Ins. Reimb.-Internal	15,982	17,963	17,106	19,717	22,226	19,248	21,475	19,830	1,645	150,325	132,071	18,254
36	Telephone Reimbursement	3,040	2,298	2,431	2,457	4,085	4,349	7,500	3,196	4,304	52,500	21,856	30,644
37	Retiree Health Exp	3,410	7,969	2,334	3,236	7,085	6,569	5,701	6,069	(368)	39,904	36,672	3,232
38	Retiree Benefit Trust Fund												
39	Benefits/Health, Dental, Visi	94,218	188,515	111,093	114,959	144,301	89,661	163,718	154,935	8,782	1,146,024	897,862	248,141
40	Workers Comp Insurance	23,737	7,613	7,613	12,613	7,513	7,613	20,698	7,613	13,085	144,889	74,415	70,474
41	Recruiting exp	909	1,394	1,331	1,175	1,271	1,501	1,000	1,519	(519)	7,000	9,101	(2,101)
42	Vacancy Rate (saving)							(88,182)		(88,182)	(617,277)	-	(617,277)
43	Total Payroll Related Exp	293,672	336,164	247,127	260,491	299,057	301,414	278,790	312,638	(33,848)	1,961,632	2,060,463	(98,921)
44													
45	Total Salaries & Payroll Ex	669,519	758,297	692,272	743,582	805,134	1,075,625	818,743	833,748	(15,005)	6,731,200	6,578,177	153,023
46													
47													

For the month of September 2007

	B	J	M	P	S	V	Y	AA	AB	AC	AQ	AR	AS
		Mar	Apr	May	Jun	Jul	Aug		Sep			YTD - Seven months	
1		Actual	Actual	Actual	Actual	Actual	Actual	Budget	Actual	better/(worse)	Budget	Actual	better/(worse)
2	MISCELLANEOUS												
48	Agency Fee/Assoc. Exp.	1,000	1,000	1,000	1,000	1,000	1,000	11,000	17,736	(6,736)	77,000	83,736	(6,736)
49	Capital Fund Expense	375	40	302				1,000	1,000	-	7,000	7,000	-
50	Admin exp share w. chapter	1,200	1,200	2,454	1,227	1,026	1,227	6,800	1,123	1,000	7,000	7,000	6,283
51	Free Life Insurance to members (SCR MRY)	3,685	3,074	3,119	3,893	4,249	4,191	4,000	1,500	4,000	28,000	22,210	5,790
52	Chapter Fund Reimbursement	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	-	10,500	10,500	-
53	Dodge Scholarship							3,600	191	3,409	25,200	453	24,747
54	Good & Welfare	181,638	189,849	14,356	39,412	167,420	21,011	-	175,580	(175,580)	-	789,267	(789,267)
55	UHW & L1877 ADMIN EXPENSE	-	-	-	-	10,000	10,000	-	10,000	(10,000)	-	30,000	(30,000)
56	Hanford - Shawhan Expense	-	-	-	-	2,200	2,200	-	1,500	(1,500)	-	5,900	(5,900)
57	Ex-Board Stipend	199,198	207,663	33,732	58,032	198,395	62,391	28,900	208,630	(179,730)	202,300	968,041	(755,741)
58	Total Miscellaneous												
59													
60													
61	ARBITRATIONS & LEGAL												
62	Arbitrations Fees	7,545	3,909	1,781	8,374	7,911	1,758	3,100	9,825	(6,725)	21,700	41,103	(19,403)
63	Retainer	13,262	8,995	21,791	11,237	27,134	20,117	21,740	23,576	(1,836)	152,180	126,113	26,067
64	Court Costs			1,215				3,300		3,300	23,100	1,215	21,885
65	Miscellaneous							500		500	3,500		3,500
66	Total Arbitrations & Leg	20,807	12,905	24,787	19,611	35,045	21,875	28,640	33,401	(4,761)	200,480	168,431	32,049
67													
68	FACILITIES												
69	Rent-SJC + 535SJC	32,716	37,673	37,731	37,643	37,597	32,827	34,922	31,282	3,640	244,454	247,469	(3,015)
70	Rent-RWC	6,114	6,114	6,130	6,130	6,130	6,330	6,114	6,330	(216)	42,798	43,278	(480)
71	Rent-Bakersfield apartment							1,525		1,525	10,675		10,675
72	Rent-Fresno	6,853	273	11,793	11,425	11,402	6,853	6,900	8,096	(1,196)	48,300	56,695	(8,395)
73	Rent-Santa Cruz, Watsonville	750	7,383	7,329	7,329	7,329	7,329	7,333	7,329	4	51,331	44,780	6,551
74	Rent-Visalia	2,157	661	925	661	661	800	700	800	(100)	4,900	6,665	(1,765)
75	Utilities	13,135	5,504	18,083	16,099	15,341	17,166	18,200	14,961	3,239	127,400	100,289	27,111
76	Kitchen Sundries	1,716	2550.93	2,153	2,328	(1,337)	5,432	3,500	4,958	(1,458)	24,500	17,800	6,700
77	Gen. Liab. Ins. & Property Te	5,417	5,417	5,433	8,089	9,216	5,417	18,033	8,314	9,719	126,230	47,304	78,926
78	Building Maintenance/Secur	7,948	11,783	8,608	17,551	13,286	14,082	9,000	10,959	(1,959)	63,000	84,216	(21,216)
79	Total Admin - Facilities	76,806	77,389	98,187	107,255	99,628	98,237	106,227	93,028	13,199	743,588	648,498	95,092
80													
81	ADMINISTRATIVE - OFFICES												
82	Audit/Acct. Fees	910	901	13,025	1,471	1,145	13,752	10,000	1,029	8,971	70,000	32,233	37,767
83	Subscriptions		171	647	-	115	226	500	259	241	3,500	1,418	2,082
84	Office Sundries	8,184	4,355	13,187	5,770	9,429	7,008	7,000	9,050	(2,050)	49,000	56,983	(7,983)
85	Office Equipment Leases	36,592	44,816	25,726	43,588	32,548	28,896	40,000	31,213	8,787	280,000	243,379	36,621
86	Equipment Maintenance & R	3,628	9,575	5,919	6,270	5,751	5,384	8,000	725	7,275	56,000	37,252	18,748
87	Contributions		283			1,000		500		500	3,500	1,283	2,217
88	Research Material & Data							2,000		2,000	14,000	-	14,000
89	Dues Implementation							600		600	4,200	-	4,200
90	Computer Database Service	881	2,482	777	777	324	52	10,000	5,553	4,447	70,000	10,847	59,153
91	Miscellaneous		750				0	1,000		1,000	7,000	750	6,250
92	Total Admin - Offices	50,195	63,051	59,584	57,876	60,312	55,318	79,600	47,829	31,771	557,200	384,146	173,054

Financial Statement
For the month of September 2007

	B	J	M	P	S	V	Y	AA	AB	AC	AQ	AR	AS
		Mar	Apr	May	Jun	Jul	Aug	Budget	Actual	better/(worse)	Budget	Actual	better/(worse)
1		Actual	Actual	Actual	Actual	Actual	Actual						
2	COMMUNICATIONS												
94	Printing	12,836	11,799	7,881	11,160	3,342	1,787	8,000	4,429	3,571	56,000	53,235	2,765
95	Paper	2,445	1,244	2,404	3,609	2,473	411	4,000	1,607	2,393	28,000	14,192	13,808
96	Website/Station/communicat	719	799	453	310	251	303	1,500	1,867	(367)	10,500	4,703	5,797
97	Telephone & Internet	13,223	11,744	13,188	18,048	11,957	12,207	18,000	9,544	8,456	126,000	89,911	36,089
98	Postage	7,775	3,494	7,296	2,842	8,675	8,709	6,000	5,776	224	42,000	44,356	(2,356)
99	Professional Fees/Translations		55	120	195			1,000	405	595	7,000	775	6,225
100	Total Communications	36,998	29,125	31,342	35,964	26,698	23,416	38,500	23,628	14,872	269,500	207,171	62,329
101	CONFERENCE/MILEAGE												
102	103												
103	Staff-Misc. Conf/Seminar				175		575	2,000	680	1,320	14,000	1,430	12,570
104	Exec. Board-Conferences							1,000		1,000	7,000		7,000
105	International Convention												
106	Industries & Members Conferences			1,500	95			1,000	27,301	(26,301)	7,000	28,896	(21,896)
107	Misc. Members-Reimbursed				604			500		500	3,500	604	2,896
108	Total Conferences/Mileage			1,500	874		575	4,500	27,981	(23,481)	31,500	30,930	570
109	STAFF MEETING & TRAINING												
110	Director Training			1,845				2,000	1,888	112	14,000	3,733	10,267
111	Staff - representation & politi	4,360	7,456	662			5,076	10,000	6,286	3,714	70,000	23,841	46,159
112	Clerical Staff		1,392	259	323	177	568	800	968	800	5,600	2,719	2,881
113	Executive Staff	2,742		886	1,030			800		(188)	5,600	5,626	(26)
114	Tuition Reim.-Internal Organizers							500		500	3,500		3,500
115	Tuition Reim.-OPEIU							500		500	3,500		3,500
116	Total Staff Training	7,102	8,848	3,652	1,354	177	5,644	14,600	9,142	5,458	102,200	36,918	66,282
117	EDUCATION & TRAINING												
118	Steward & Chief Steward Training							300		300	2,100		2,100
119	Executive Board							500	3,852	(3,352)	3,500	3,852	(362)
120	Education & Training Committee Meeting & Materials				29			4,000		4,000	28,000	28	27,972
121	Industry Training Events							2,000		2,000	14,000		14,000
122	Total Education & Traini				29			6,800	3,862	2,938	47,600	3,891	43,709
123	POLITICAL/SOCIAL INVOLVEMENT												
124	Candidates Account (\$0.10 F	7,930	9,412	9,579	9,902	4,091	2,004	6,000	2,038	3,962	42,000	44,955	(2,955)
125	Issues Account						2,003			(2,038)		4,041	(4,041)
126	Legal							4,000		4,000	28,000		28,000
127	Committee Meetings	91	86	68	1,298		401	300		300	2,100	1,944	156
128	Conferences					509		2,000		2,000	14,000	509	13,491
129	Electoral Staff/ Activity							300		300	2,100		2,100
130	Polls & Surveys					247		500		500	3,500	247	3,253
131	Special Printing							200		200	1,400		1,400
132	Subscriptions							25		25	175		175
133	Total Political/Social Inv	8,021	9,498	9,647	11,199	4,946	4,408	13,325	4,076	9,249	93,275	51,696	41,579

Financial Statement

For the month of September 2007

	B	J	M	P	S	V	Y	AA	AB	AC	AQ	YTD - Seven months		AS
		Mar	Apr	May	Jun	Jul	Aug		Sep			Budget	Actual	better/(worse)
1		Actual	Actual	Actual	Actual	Actual	Actual	Budget	Actual	better/(worse)	Budget	Actual	better/(worse)	
2														
138														
139	SOCIAL & ECONOMIC JUSTICE													
140	Committee Meetings													
141	Conferences	778		22	524		359	300		300	2,100	904	1,196	
142	Contributions/Solidarity	500			350		193	300		300	2,100	971	1,129	
143	*** \$1.00 PER MEMBER	4,588	312	1,182		2,487	300	200		200	1,400	1,150	250	
144	Total Social & Economic	5,867	312	1,204	874	2,487	8,844	3,125	3,246	(121)	21,875	20,859	1,216	
145						2,487	9,896	3,925	3,246	679	27,475	23,884	3,791	
146	MEMBER INVOLVEMENT													
147	Memorabilia/Give away Merr	927	20,716	17,280	8,235	21,247	82,260	5,000	4,371	629	35,000	155,035	(120,035)	
148	Awards/Recognition	500						300		300	2,100	500	1,600	
149	Planning & Event Prep							300		300	2,100	-	2,100	
150	Ex Board / Advisory Board Reimbursement							500		500	3,500	-	3,500	
151	Rally Rental & Bus		3,570	1,945	760		74	4,000	1,034	2,966	28,000	7,383	20,617	
152	Member Reimbursement/Lost time		283	831		1,414	569	5,000	1,218	3,782	35,000	4,315	30,685	
153	Transportation & Vehicle Exp	134						500		500	3,500	134	3,366	
154	Total Member Involvement	1,561	24,569	20,056	8,995	22,661	82,903	15,500	6,623	8,977	109,200	167,368	(58,168)	
155														
156	NEGOTIATIONS													
157	Printing Contracts	30,237				507	(447)	5,000		5,000	35,000	30,287	4,703	
158	Meetings & Supplies	445	1,690	1,087	2,287	2,656	6,527	5,000	11,824	(6,824)	35,000	26,516	8,484	
159	Negotiations Committee Food							5,000		5,000	35,000	-	35,000	
160	Strike Preparations							1,000		1,000	7,000	-	7,000	
161	Automatic Strike Fund Transfer (\$0.50 per member/mom)							18,750		18,750	131,250	-	131,250	
162	Total Negotiations	30,682	1,890	1,087	2,287	3,163	6,081	34,750	11,824	22,926	243,250	56,813	186,437	
163														
164	MEETINGS & EVENTS													
165	Executive Board Meetings					665	210	2,000		2,000	14,000	982	13,018	
166	Steward/Council meetings	294	99	5,484	4,961	4,281	26	4,500	4,500	4,500	31,500	15,146	16,354	
167	521 Party & other events	2,595	5,886	22,719	1,565		3,516	7,000	7,000	7,000	49,000	36,281	12,719	
168	Advisory Board Meetings	15,570		-			2,761	10,000		10,000	70,000	18,331	51,669	
169	Miscellaneous							200	(1)	201	1,400	(1)	1,401	
170	Total Meetings & Events	18,459	5,985	28,311	6,526	4,946	6,513	23,700	(1)	23,701	165,900	70,739	95,161	
171														

Financial Statement

For the month of September 2007

	B	J	M	P	S	V	Y	AA	AB	AC	AQ	AR	AS
		Mar	Apr	May	Jun	Jul	Aug		Sep				
		Actual	Actual	Actual	Actual	Actual	Actual	Budget	Actual	better/(worse)	Budget	Actual	better/(worse)
1													
2													
172	REPRESENTATIVE DUES												
173	SEIU \$7.65 ea	571,918	386,333	397,907	412,366	424,540	417,300	430,848	498,552	(67,704)	3,015,936	3,108,915	(92,979)
174	SEIU Unity Fund \$5.00ea	347,500	238,740	247,290	254,750	265,260	263,365	266,200	312,196	(45,996)	1,863,400	1,929,101	(65,701)
175	SEIU Retirees \$1.00ea	-	-	-	-	-	602	60	-	60	420	602	(182)
176	SEIU Associate Members-1.1	-	-	-	-	-	-	12	-	12	84	-	84
177	SEIU/ State Council-\$2.53ea	197,089	126,639	130,547	157,157	139,986	148,237	142,490	154,040	(11,551)	997,427	1,053,695	(56,268)
178	So Bay CLC \$0.55ea	20,898	11,230	11,172	16,311	14,002	16,062	12,100	12,164	(64)	84,700	101,839	(17,139)
179	SMCO CLC \$0.60ea	4,965	2,571	2,440	2,629	2,371	2,155	2,838	2,568	270	19,866	19,699	167
180	Fresno CLC \$0.35ea	510	1,619	1,950	2,237	1,967	2,198	2,800	5,109	(2,309)	19,600	15,589	4,011
181	Bakersfield CLC \$0.25ea	-	1,585	1,753	1,854	1,760	1,808	1,625	2,042	(417)	11,375	10,803	572
182	Monterey & Santa Cruz LC \$	1,880	2,648	3,605	3,600	4,284	3,989	3,300	3,823	(523)	23,100	23,828	(728)
183	CA Labor Fed 50% X .47ea	13,261	8,901	9,167	9,501	9,830	9,720	9,048	13,191	(4,143)	63,333	73,670	(10,238)
184	Building Trades-SMCO	250	250	250	275	275	275	250	275	(25)	1,750	1,850	(100)
185	Total Representative Du	1,158,271	780,517	806,081	860,678	864,274	866,710	871,570	1,003,960	(132,390)	6,100,991	6,339,491	(238,500)
186													
187	TOTAL EXPENSES	2,684,563	2,280,894	2,112,499	2,216,213	2,418,840	2,607,469	2,390,457	2,612,055	(221,599)	16,733,201	16,832,633	(99,333)
188													
189	TOTAL INCOME LESS TOT	(642,897)	(283,919)	559,817	(21,997)	(183,236)	(180,964)	(2,500)	273,643	276,142	(17,500)	(479,652)	(462,054)
190													
191	VOLUNTARY TRANSFERS												
192	Building Funds	-	-	-	-	-	-	9,375	-	-	-	65,625	-
193	Automatic Legal Defense Fu	-	-	-	-	-	-	-	-	-	-	-	-
194	Strike Fund	-	-	-	-	-	-	-	-	-	-	-	-
195	Total Transfers	9,375	9,375	9,375	9,375	9,375	9,375	9,375	9,375	-	65,625	65,625	-
196	TOTAL INCOME LESS EXP	(652,272)	(293,294)	550,442	(31,372)	(192,611)	(190,339)	(11,875)	264,268	276,142	(83,125)	(646,177)	(462,054)

EXHIBIT Q

SEIU Local 521
Financial Statement - For the month of November 2007

	B	J	M	P	S	V	Y	AB	AE	AG	AH	AI	AQ	AR	AS
		Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Budget	Actual	better/(worse)	Budget	Actual	better/(worse)
1	TOTAL DUES RECEIPTS	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual						
2	OTHER INCOME	1,937,972	1,960,198	2,661,404	2,182,557	2,224,147	2,412,425	2,867,623	2,595,318	2,376,957	2,358,290	(18,667)	21,392,616	21,199,934	(192,682)
3	Interest & Dividends	-	6,158	7,601	6,986	7,767	10,529	15,063	20,039	2,400	4,553	2,153	21,600	78,696	57,096
4	SMIHSS Administrative Reim	-	25,000	-	-	-	-	-	-	5,000	25,000	20,000	45,000	50,000	5,000
5	Sublease Rent	3,311	3,311	3,311	4,626	3,457	3,536	3,391	3,761	3,600	3,536	(64)	32,400	32,240	(160)
6	Misc. Income	383	2,308	-	47	234	15	(378)	298	-	-	-	-	2,905	2,905
7	Total Misc. Income	3,694	36,777	10,912	11,659	11,457	14,081	18,075	24,096	11,000	33,089	22,089	99,000	163,841	64,841
8	TOTAL GENERAL FUND IN	1,941,666	1,996,975	2,672,316	2,194,216	2,235,604	2,426,506	2,885,698	2,619,416	2,387,957	2,391,379	3,421	21,491,616	21,363,775	(127,841)
9	GENERAL FUND EXPENSES														
10	ORGANIZING OFFSET	301,077	301,077	301,077	301,077	301,077	301,077	301,077	301,077	301,077	301,077	(0)	2,709,697	2,709,694	2
11	SALARIES														
12	Administrative	29,293	34,472	34,472	34,472	34,472	50,267	30,948	34,472	37,345	34,472	2,873	336,104	317,340	18,764
13	Admin Support	15,732	18,304	32,391	32,264	32,224	54,556	28,182	28,101	37,674	28,101	9,573	339,062	289,854	69,208
14	Directors	63,466	65,828	65,581	71,063	70,314	105,810	76,759	70,612	83,896	73,821	10,075	755,064	663,256	91,808
15	Internal Organizers/Research	179,499	207,013	218,022	248,018	258,140	413,449	275,800	282,380	252,575	278,360	(25,784)	2,273,178	2,360,682	(87,504)
16	Clerical	58,721	67,066	54,179	55,436	60,802	87,339	59,864	61,663	68,579	61,107	7,472	617,208	566,179	51,029
17	Facilities	3,080	3,321	3,080	3,362	3,203	4,878	3,369	3,374	3,337	6,496	(3,159)	30,029	33,752	(3,723)
18	Data Base Services	17,152	21,396	22,889	23,847	23,361	36,212	23,837	24,277	23,217	24,006	(788)	208,949	216,979	(8,029)
19	Temp. Internal Organizers/Re	2,889	3,440	5,190	2,964	9,863	2,615	3,223	4,349	5,000	6,525	(3,525)	45,000	57,752	(12,752)
20	Temp. Clerical/Support	915	645	4,275	5,742	9,403	5,993	9,720	14,533	3,000	6,525	(3,525)	27,000	57,752	(30,752)
21	Vacation & Comp Time	5,611	656	5,067	5,921	4,294	13,090	9,408	7,993	25,331	15,609	9,722	227,980	67,650	160,329
22	Total Salaries	375,947	422,143	445,146	483,091	506,077	774,211	521,110	531,755	539,953	528,497	11,455	4,859,574	4,587,977	271,596
23	PAYROLL RELATED EXPENSES														
24	Pension	102,326	28,766	58,608	61,103	60,615	96,949	64,119	66,395	70,927	66,529	4,398	638,343	605,411	32,933
25	Payroll Taxes Expenses	30,413	57,561	26,190	29,002	29,278	52,783	33,063	33,815	50,662	31,130	19,532	455,959	323,245	132,715
26	Travel Staff-Admin	951	3,012	5,877	434	3,564	6,410	4,020	883	1,500	2,145	(645)	13,500	27,297	(13,797)
27	Travel Staff-Internal Organiz	5,977	9,614	3,634	1,756	5,335	3,757	5,689	2,610	3,000	7,393	(4,393)	27,000	45,766	(18,766)
28	Mileage/Ins. Reimb.-Admin &	2,209	1,049	509	3,639	3,084	2,164	2,184	4,260	10,392	1,116	9,276	93,528	20,213	73,315
29	Mileage/Ins. Reimb.-Internal	15,982	17,963	17,106	19,717	22,226	19,248	19,830	24,719	21,475	18,419	3,056	193,275	175,210	18,065
30	Telephone Reimbursement	3,040	2,298	2,431	2,457	4,085	4,349	3,186	5,281	7,500	4,044	3,456	67,500	31,182	36,318
31	Relieve Health Exp	3,410	7,969	2,334	3,236	7,085	6,569	6,069	6,069	5,701	4,352	1,348	51,305	47,093	4,212
32	Relieve Benefit Trust Fund	10,400	10,400	10,400	10,400	10,400	10,400	10,400	10,400	10,400	10,400	-	93,600	93,600	-
33	Benefit/Health, Dental, Visio	94,218	188,515	111,093	114,959	144,501	89,661	154,935	152,707	163,718	126,609	37,109	1,473,459	1,177,199	296,260
34	Workers Comp Insurance	23,737	7,613	7,613	12,613	7,613	7,613	7,613	5,776	20,698	7,718	12,980	186,266	87,909	98,377
35	Recruiting exp	909	1,394	1,331	1,175	1,271	1,501	1,519	371	1,000	1,409	(409)	9,000	10,881	(1,881)
36	Vacancy Rate (savings)	293,572	336,154	247,127	260,491	299,057	301,414	312,638	313,285	278,790	281,265	(88,182)	2,509,112	2,645,004	(793,642)
37	Total Payroll Related Exp	669,519	758,297	692,272	743,582	805,134	1,075,625	833,748	845,041	818,743	809,762	8,980	7,368,686	7,232,981	135,705
38	Total Salaries & Payroll Exp														
39															
40															
41															
42															
43															
44															
45															
46															

SEIU Local 521
Financial Statement - For the month of November 2007

	B	J	M	P	S	V	Y	AB	AE	AG	AH	AI	AQ	AR	AS
	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Budget	Actual	Nov	better/(worse)	Budget	Actual	better/(worse)
MISCELLANEOUS															
48	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual							
49	Agency Fee/Assoc. Exp.	11,000	11,000	11,000	11,000	11,000	11,000	11,000	11,000	11,000	11,000	-	99,000	105,736	(6,736)
50	Capital Fund Expense	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	-	9,000	9,000	-
51	Admin exp share w. chapter	375	40	302					1,000	1,000		1,000	9,000	717	8,283
52	Free Life insurance to members (SCR, MRY &	3,685	1,200	2,454	1,227	1,026	1,227	1,123	6,800	12,231	12,231	(5,431)	61,200	21,188	40,012
53	Chapter Fund Reimbursment	3,685	3,074	3,119	3,893	4,249	4,191	10,845	4,000	4,484	4,484	(484)	36,000	37,540	(1,540)
54	Dodge Scholarship	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	-	13,500	13,500	-
55	Good & Welfare						262		3,600		3,600	-	32,400	453	31,947
56	UHW & L1877 ADMIN EXPENSE	181,638	189,849	14,356	39,412	167,420	21,011	26,741	-	69,603	69,603	(69,603)	-	885,611	(885,611)
57	Hanford - Shawhan Expense	-	-	-	-	10,000	10,000	10,000	-	10,000	10,000	(10,000)	-	50,000	(50,000)
58	Ex-Board Stipend	-	-	-	-	2,200	2,200	1,700	-	2,000	2,000	(2,000)	-	9,600	(9,600)
59	Total Miscellaneous	199,198	207,663	33,732	58,032	198,395	52,391	208,630	28,900	111,819	(82,919)	260,100	1,133,345	(873,245)	
ARBITRATIONS & LEGAL															
61	Arbitrations Fees	7,545	3,909	1,781	8,374	7,911	1,758	9,825	3,492	3,100	7,532	(4,432)	27,900	52,128	(24,228)
62	Retainer	13,262	8,995	21,791	11,237	27,134	20,117	23,576	53,194	21,740	24,661	(2,921)	195,660	203,968	(8,308)
63	Court Costs			1,215						3,300		3,300	29,700	1,215	28,485
64	Miscellaneous									500		500	4,500	-	4,500
65	Total Arbitrations & Legal	20,807	12,905	24,787	19,611	35,045	21,875	33,401	56,686	28,640	32,193	(3,553)	257,760	257,310	450
FACILITIES															
68	Rent-SJC + 535SJC	32,716	37,673	37,731	37,643	37,597	32,827	31,282	32,964	34,922	38,558	(3,636)	314,298	318,991	(4,693)
70	Rent-RWC	6,114	6,114	6,130	6,130	6,130	6,330	6,330	6,330	6,114	6,330	(216)	55,026	55,938	(912)
71	Rent-Bakersfield apartment									1,525	-	1,525	13,725	-	13,725
72	Rent-Fresno	6,853	273	11,793	11,425	11,402	6,853	8,096	8,368	7,333	7,196	(296)	62,100	72,259	(10,159)
73	Rent-Santa Cruz, Watsonville	750	7,383	7,329	7,329	7,329	7,329	7,329	5,601	6,900	7,329	4	65,997	8,287	57,710
74	Rent-Visalia	2,157	661	925	661	661	800	800	800	700	800	(100)	6,300	8,265	(1,965)
75	Utilities	13,135	5,504	18,083	16,099	15,341	17,166	14,961	12,308	18,200	13,206	4,994	163,800	125,804	37,996
76	Kitchen Sundries	1,716	2,550.93	2,153	2,328	(1,337)	5,432	4,958	698	3,500	3,752	(252)	31,500	22,250	9,250
77	Gen. Liab. Ins. & Property Tax	5,417	5,417	5,433	8,089	9,216	5,417	8,314	11,752	18,033	32,611	(14,578)	162,266	91,666	70,600
78	Building Maintenance/Security	7,948	11,783	8,608	17,551	13,286	14,082	10,959	9,744	9,000	7,996	1,004	81,000	101,956	(20,956)
79	Total Adminin - Facilities	76,806	77,359	98,187	107,255	99,626	96,237	93,028	88,565	106,227	117,778	(11,551)	956,042	854,839	101,202
ADMINISTRATIVE - OFFICES															
81	Audit/Act. Fees	910	901	13,025	1,471	1,145	13,752	1,029	6,474	10,000	13,850	(3,850)	90,000	52,557	37,443
82	Subscriptions		171	647		115	226	259	38	500	447	53	4,500	1,903	2,597
83	Office Sundries	8,184	4,355	13,187	5,770	9,429	7,008	9,050	10,462	7,000	6,777	223	63,000	74,221	(11,221)
84	Office Equipment Leases	36,592	44,816	25,726	43,588	32,548	28,896	31,213	37,079	40,000	45,453	(5,453)	360,000	325,911	34,089
85	Equipment Maintenance & Repair	3,628	9,575	5,919	6,270	5,751	5,384	725	4,767	8,000	3,091	4,909	72,000	45,110	26,890
86	Contributions			283		1,000				500	140	360	4,500	1,422	3,078
87	Research Material & Data									2,000		2,000	18,000	-	18,000
88	Dues Implementation									600		600	5,400	-	5,400
89	Computer Database Services	881	2,482	777	777	324	52	5,553	312	10,000	52	9,948	90,000	11,212	78,788
90	Miscellaneous		750				0			1,000		1,000	9,000	750	8,250
91	Total Adminin - Offices	50,195	63,051	59,564	57,876	50,312	55,318	47,829	59,131	79,600	69,810	9,790	716,400	513,087	203,313
COMMUNICATIONS															

SEIU Local 521
Financial Statement - For the month of November 2007

	B	J	M	P	S	V	Y	AB	AE	AG	AH	AI	AQ	AR	AS
	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Nov	Nov	Nov	Nov	Nov	Nov
1															
2	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Budget	Actual	better/(worse)	Budget	Actual	better/(worse)	
95	Printing	12,836	11,799	7,881	11,160	3,342	1,787	4,429	5,923	8,000	6,661	1,339	72,000	65,819	6,181
96	Paper	2,445	1,244	2,404	3,609	2,473	411	1,607	5,620	4,000	814	3,186	36,000	20,626	15,374
97	Website/Station/communicati	719	799	453	310	251	303	1,867	1,230	1,500	278	1,222	13,500	6,211	7,289
98	Telephone & Internet	13,223	11,744	13,188	18,048	11,957	12,207	9,544	13,463	18,000	10,927	7,073	162,000	114,300	47,700
99	Postage	7,775	3,484	7,296	2,642	8,675	8,709	5,776	13,169	6,000	8,216	(2,216)	54,000	65,741	(11,741)
100	Professional Fees/Translations	55	120	120	195	8675	8,709	405	90	1,000	1,000	1,000	9,000	865	8,135
101	Total Communications	36,998	29,125	31,342	35,964	26,698	23,416	23,628	39,496	38,500	26,895	11,605	346,500	273,563	72,937
102	CONFERENCE/MILEAGE														
104	Staff-Misc. Conf/Seminar				175				(601)	2,000		2,000	18,000	828	17,172
105	Exec. Board-Conferences								2,175	1,000		1,000	9,000	2,175	6,825
106	International Convention														
107	Industries & Members Conferences			1,500	95					1,000	2,248	(1,248)	9,000	31,145	(22,145)
108	Misc. Members-Reimbursed				604				846	500		500	4,500	1,450	3,050
109	Total Conferences/Mileage	-	-	1,500	874	-	575	27,981	2,420	4,500	2,248	2,252	40,500	35,598	4,902
110	STAFF MEETING & TRAINING														
111	Director Training														
112	Staff - representation & politic	4,360	7,456	662	323	177	5,076	6,286	1,616	10,000	11,231	(1,231)	90,000	36,687	53,313
113	Clerical Staff	1,392		259	1,030		568		69	800	899	(99)	7,200	3,687	3,513
114	Executive Staff	2,742		886				968	2,053	500	143	657	4,500	7,821	(621)
116	Tuition Reim.-Internal Organizers									500		500	4,500	-	4,500
117	Tuition Reim.-OPEIU									500		500	4,500	-	4,500
118	Total Staff Training	7,102	8,848	3,652	1,354	177	5,644	9,142	6,012	14,600	12,273	2,327	131,400	54,202	77,198
119	EDUCATION & TRAINING														
120	Steward & Chief Steward Training									300	449	(149)	2,700	449	2,251
121	Executive Board								124	500		500	4,500	514	514
122	Education & Training Committee Meeting & Materials				29				439	4,000		4,000	36,000	468	35,532
123	Industry Training Events									2,000		2,000	18,000	-	18,000
124	Total Education & Traini	-	-	-	29	-	-	3,862	563	6,800	449	6,351	61,200	4,903	56,297
126	POLITICAL/SOCIAL INVOLVEMENT														
128	Candidates Account (\$0.10 p	7,930	9,412	9,579	9,902	4,091	2,004	2,038	2,048	6,000	2,017	3,983	54,000	49,020	4,980
129	Issues Account									-	2,017	(2,017)	-	8,105	(8,105)
130	Legal								2,047	4,000		4,000	36,000	-	36,000
131	Committee Meetings	91	86	68	1,298	509	401			300	239	61	2,700	2,183	517
132	Conferences									2,000	1,528	472	18,000	2,036	15,964
133	Electoral Staff/ Activity									300		300	2,700	-	2,700
134	Polls & Surveys					247				500		500	4,500	247	4,253
135	Special Printing									200		200	1,800	-	1,800
136	Subscriptions									25		25	225	-	225
137	Total Political/Social Inv.	8,021	9,498	9,647	11,199	4,846	4,408	4,076	4,095	13,325	5,800	7,525	119,925	61,591	58,334

SEIU Local 521
Financial Statement - For the month of November 2007

	B	J	M	P	S	V	Y	AB	AE	AG	AH	AI	AQ	AR	AS
1		Mar	Apr	May	Jun	Jul	Aug	Sep	Oct		Nov				
2		Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Budget	Actual	better/(worse)	Budget	Actual	better/(worse)
138	SOCIAL & ECONOMIC JUSTICE														
139	Committee Meetings			22	524		359		84	300	70	230	2,700	1,058	1,642
140	Conferences	778					193			300		300	2,700	971	1,729
141	Contributions/Solidarity	500			350		300		250	200	300	(100)	1,800	1,700	100
142	*** \$1.00 PER MEMBER	4,588	312	1,182		2,487	8,844	3,246	1,073	3,125	5,557	(2,432)	28,125	27,290	835
143	Total Social & Economic	5,867	312	1,204	874	2,487	9,696	3,246	1,407	3,925	5,927	(2,002)	35,325	31,019	4,306
144	MEMBER INVOLVEMENT														
145	Memorabilia/Give away Mem	927	20,716	17,280	8,235	21,247	82,260	4,371	5,610	5,000	(710)	5,710	45,000	159,935	(114,935)
146	Awards/Recognition	500								300		300	2,700	500	2,200
147	Planning & Event Prep									300		300	2,700	-	4,500
148	Ex Board / Advisory Board Reimbursement									500		500	4,500	-	4,500
149	Rally Rental & Bus		3,570	1,945	760		74	1,034	45	4,000	548	4,000	36,000	7,428	28,572
150	Member Reimbursement/Lost time	134	283	831		1,414	569	1,218		5,000		4,452	45,000	4,863	40,137
151	Transportation & Vehicle Exp									500		500	4,500	134	4,366
152	Total Member Involvement	1,561	24,569	20,056	8,995	22,661	82,903	6,623	5,655	15,600	(162)	15,762	140,400	172,861	(32,461)
153	NEGOTIATIONS														
154	Printing Contracts	30,237				507	(447)		10,652	5,000		5,000	45,000	40,949	4,051
155	Meetings & Supplies	445	1,690	1,087	2,287	2,656	6,527	11,824	5,805	5,000	1,462	3,538	45,000	33,784	11,216
156	Negotiations Committee Food									1,000		1,000	9,000	-	9,000
157	Strike Preparations									18,750		18,750	168,750	-	168,750
158	Automatic Strike Fund Transfer (\$0.50 per member/month)									34,750	1,462	33,288	312,750	74,733	238,017
159	Total Negotiations	30,682	1,690	1,087	2,287	3,163	6,081	11,824	16,457						
160	MEETINGS & EVENTS														
161	Executive Board Meetings			108		665	210		589	2,000	842	1,158	18,000	2,414	15,586
162	Steward/Council meetings	294	99	5,484	4,961	4,281	26		14,037	4,500		4,500	40,500	29,183	11,317
163	521 Party & other events	2,585	5,886	22,719	1,565		3,516		43,057	7,000	5,738	1,262	63,000	42,019	20,981
164	Advisory Board Meetings	15,570		-			2,761			10,000		10,000	90,000	61,389	28,611
165	Miscellaneous									200		200	1,800	(1)	1,801
166	Total Meetings & Events	18,459	5,985	28,311	6,526	4,946	6,513	(1)	57,684	23,700	6,581	17,119	213,300	135,004	78,296
167															
168															
169															
170															
171															

SEIU Local 521
Financial Statement - For the month of November 2007

	B	J	M	P	S	V	Y	AB	AE	AG	AH	AI	AQ	YTD - Nine months	AR	AS
		Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Budget	Actual	better/(worse)	Budget	Actual	better/(worse)	
1	REPRESENTATIVE DUES	Actual	Actual	Actual	Actual	Actual	Actual	Actual	Actual							
172	SEIU \$7.65 ea	571,918	386,333	397,907	412,366	424,540	417,300	498,552	424,024	430,848	421,423	9,425	3,877,632	3,954,362	(76,730)	
173	SEIU Unity Fund \$5.00ea	347,500	238,740	247,290	254,750	265,260	263,365	312,196	265,035	266,200	260,575	5,625	2,395,800	2,454,711	(58,911)	
175	SEIU Retirees \$1.00ea	-	-	-	-	-	602	-	50	60	1	59	540	653	(113)	
176	SEIU Associate Members-1.C	-	-	-	-	-	-	-	-	12	-	12	108	-	108	
177	SEIU/ State Council-\$2.53ea	197,089	126,639	130,547	157,157	139,986	148,237	154,040	139,346	142,490	138,156	4,333	1,282,406	1,331,198	(48,791)	
178	So Bay CLC \$0.55ea	20,898	11,230	11,172	16,311	14,002	16,062	12,164	11,910	12,100	11,325	775	108,900	125,073	(16,173)	
179	SMCO CLC \$0.60ea	4,965	2,571	2,440	2,629	2,371	2,155	2,568	2,553	2,838	2,568	250	25,542	24,839	703	
180	Fresno CLC \$0.35ea	510	1,619	1,950	2,237	1,967	2,198	5,109	2,200	2,800	2,230	570	25,200	20,020	5,180	
181	Bakerfield CLC \$0.25ea	-	1,585	1,753	1,854	1,760	1,808	2,042	1,810	1,625	1,900	(275)	14,625	14,512	113	
182	Monterey & Santa Cruz LC \$1	1,880	2,648	3,605	3,600	4,284	3,989	3,823	3,326	3,300	3,597	(297)	29,700	30,752	(1,052)	
183	CA Labor Fed 50% X .47ea	13,281	8,901	9,167	9,501	9,830	9,720	13,191	9,778	9,048	9,709	(662)	81,428	93,057	(11,630)	
184	Building Trades-SMCO	250	250	250	275	275	275	275	275	250	275	(25)	2,250	2,400	(150)	
185	Total Representative Du	1,158,271	780,517	806,081	860,678	864,274	865,710	1,003,960	860,307	871,570	851,779	19,791	7,844,131	8,051,577	(207,446)	
186	TOTAL EXPENSES	2,584,563	2,280,894	2,112,499	2,216,213	2,418,840	2,607,469	2,612,055	2,408,082	2,390,457	2,355,692	34,765	21,514,116	21,596,307	(82,192)	
188	TOTAL INCOME LESS TOT	(642,897)	(283,919)	559,817	(21,997)	(183,236)	(180,964)	273,643	211,334	(2,500)	35,687	38,186	(22,500)	(232,532)	(210,033)	
189	VOLUNTARY TRANSFERS															
190	Building Funds															
191	Automatic Legal Defense Fur	9,375	9,375	9,375	9,375	9,375	9,375	9,375	9,375	9,375	9,375	-	84,375	84,375	-	
193	Strike Fund	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
194	Total Transfers	9,375	9,375	9,375	9,375	9,375	9,375	9,375	9,375	9,375	9,375	-	84,375	84,375	-	
195	TOTAL INCOME LESS EXP	(652,272)	(293,294)	550,442	(31,372)	(192,611)	(190,339)	264,268	201,959	(11,875)	26,312	38,186	(106,875)	(316,907)	(210,033)	

EXHIBIT R

SEIU Local 521
Financial Statement for the year of 2008

		Jan		
Headcount		Budget	Actual	better/ (worse)
52,792	TOTAL DUES RECEIPTS	2,333,518	2,196,636	(136,882)
	OTHER INCOME	-		-
	Interest & Dividends	8,300	14,693	6,393
	SMIHSS Administrative Reimbursement	4,167	25,000	20,833
	Sublease Rent	4,240	3,787	(453)
	Misc. Income - SEIU Int'l subsidy	2,415		(2,415)
	Total Misc. Income	19,122	43,479	24,358
	TOTAL GENERAL FUND INCOME	2,352,640	2,240,115	(112,525)
	GENERAL FUND EXPENSES			
	ORGANIZING OFFSET	317,262	317,262	0
	SALARIES	-		-
5	Administrative	37,619	34,472	3,147
9	Admin Support	41,346	28,208	13,138
13	Directors	84,661	77,095	7,566
55	Internal Organizers/Research	268,360	258,666	9,694
17	Clerical	66,650	56,600	10,050
2	Facilities	5,909	5,765	144
8	Data Base Services	26,995	25,261	1,734
	Temp. Internal Organizers/Research	5,000	135	4,865
	Temp. Clerical/Support	3,000	10,390	(7,390)
	Vacation & Comp Time	23,993	11,942	12,052
109	Total Salaries	607,828	508,533	99,295
	PAYROLL RELATED EXPENSES	-		-
	Pension	84,784	65,063	19,721
	Payroll Taxes Expenses	57,584	52,423	5,160
	Travel Staff-Admin	4,000	3,672	328
	Travel Staff- Internal Organizers	5,000	1,572	3,428
	Mileage/Ins. Reimb.-Admin & Director	9,366	2,024	7,342
	Mileage/Ins. Reimb.-Internal Organizers	24,943	20,403	4,540
	Telephone Reimbursement	8,200	9,037	(837)
9	Retiree Health Exp - including Ward	7,392	6,301	1,090
61	Retire Benefit Trust Fund	9,400	9,400	-
	Benefits(Health, Dental, Vision,life,401K,Fle	190,063	151,800	38,263
	Workers Comp Insurance	7,913	7,613	300
	Recruiting exp	1,200	211	989
10%	Vacancy Rate **most position has filled	-		-
	Total Payroll Related Expenses	409,843	329,518	80,325
	Total Salaries & Payroll Expenses	1,017,672	838,052	179,620
	MISCELLANEOUS	-		-
	Agency Fee/Assoc. Exp.	12,000	12,000	-
	Capital Fund Expense	1,000	1,000	-
	Admin exp share w. chapter	1,000	652	348

SEIU Local 521
Financial Statement for the year of 2008

		Jan		
Headcount		Budget	Actual	better/ (worse)
	Free Life insurance to members (SCR, MRY	6,800	2,068	4,732
	Chapter Fund Reimbursement	4,800	2,872	1,928
	Dodge Scholarship	1,250	1,250	-
	Computer Database Unionwares & MRC cen	100,000		100,000
	Bill Shawhan	10,000	10,000	-
	Ex-Board Stipends	2,100	2,300	(200)
	Good & Welfare	3,600		3,600
	Total Miscellaneous	142,550	32,142	110,408
		-		-
	ARBITRATIONS & LEGAL	-		-
	Arbitrations Fees	5,000	2,847	2,153
	Retainer	26,500	24,481	2,020
	Court Costs	2,750		2,750
39016	Automatic Legal Defense Fund (\$0.25 per me	9,754	9,754	-
	Miscellaneous	417	16	400
	Total Arbitrations & Legal	44,421	37,098	7,323
		-		-
	FACILITIES	-		-
	Rent-SJC	34,000	33,931	69
	Rent-RWC	6,330	6,330	-
	Rent-Bakersfield apartment	1,545	-	1,545
	Rent-Fresno **no moving	7,200	8,121	(921)
	Rent-Santa Cruz, Watsonville & Hollister	9,108	5,676	3,432
	Rent-Visalia	1,000	800	200
	Utilities	21,000	13,562	7,438
	Kitchen Sundries	4,000	3,292	708
	Gen. Liab. Ins. & Property Tax	15,944	11,873	4,071
	Building Maintenance/Security/Janitorial	12,700	8,784	3,916
	Total Admin - Facilities	112,827	92,370	20,457
		-		-
	ADMINISTRATIVE - OFFICES	-		-
	Audit/Acct. Fees	8,708	3,208	5,501
	Subscriptions	500	227	273
	Office Sundries	8,000	4,456	3,544
	Office Equipment Leases	40,000	36,834	3,166
	Equipment Maintenance & Repair Contracts	8,000	2,714	5,286
	Contributions	500		500
	Research Material & Data	1,000	268	732
	Miscellaneous	1,000		1,000
	Total Admin - Offices	67,708	47,707	20,001
		-		-
	COMMUNICATIONS	-		-
	Printing	10,000	4,048	5,952
	Paper	6,000	740	5,260
	Website/Station/communication	1,500		1,500
	Telephone & Internet ** legacy exp only	2,500	7,165	(4,665)
	Postage	7,000	1,839	5,161

SEIU Local 521
Financial Statement for the year of 2008

Headcount	Budget	Jan	
		Actual	better/ (worse)
Professional Fees/Translations	417		417
Total Communications	27,417	13,792	13,624
CONFERENCES/MILEAGE	-		-
Staff-Misc. Conf/Seminar staff retreat?	2,000		2,000
Exec. Board-Conferences	1,000	650	350
International Convention - no lost time w/ 27	4,635		4,635
Industries & Members Conferences	1,000	37	963
Misc. Members-Reimbursed	500		500
Total Conferences/Mileage	9,135	687	8,448
STAFF MEETING & TRAINING	-		-
Director Training	800		800
Staff - representation & political & commun	7,000	7,718	(718)
Clerical Staff	800	103	697
Executive Staff	800	531	269
Tuition Reim.-Internal Organizers	417		417
Tuition Reim.-OPEIU	417		417
Total Staff Training	10,233	8,352	1,881
EDUCATION & TRAINING	-		-
Steward & Chief Steward Training	2,383		2,383
Executive Board - + SEIU Int'l training (IFC	500		500
Education & Training Committee Meeting &	4,000		4,000
Industry Training Events	1,667		1,667
Total Education & Training	8,550	-	8,550
POLITICAL/SOCIAL INVOLVEMENT	-		-
Candidates Account (\$0.15 per member per m	5,852	5,812	41
Issues Account (\$0.05 per member per month	1,951	1,937	14
Legal	4,000	285	3,715
Committee Meetings	300	717	(417)
Conferences	2,000	349	1,651
Electoral Staff/ Activity	300		300
Polls & Surveys	500		500
Special Printing	200		200
Subscriptions	25		25
Total Political/Social Involvement	15,128	9,099	6,029
SOCIAL & ECONOMIC JUSTICE	-		-
Committee Meetings	300	101	199
Conferences	417	-	417
Contributions/Solidarity	333	1,137	(804)
52,792 Caucus Activities	4,399	770	3,629
Total Social & Economic Justice	5,449	2,008	3,442
MEMBER INVOLVEMENT	-		-
Memorabilia/Give away Member Pride	1,667	(3,511)	5,177
Awards/Recognition	1,667		1,667

SEIU Local 521
Financial Statement for the year of 2008

		Jan	
Headcount	Budget	Actual	better/ (worse)
Planning & Event Prep	250		250
Ex Board / Advisory Board Reimbursement	417		417
Rally Rental & Bus	4,000	154	3,846
Member Reimbursement/Lost time	5,000		5,000
Transportation & Vehicle Expenses	500		500
Total Member Involvement	13,500	(3,357)	16,857
NEGOTIATIONS	-		-
Printing Contracts	4,167		4,167
Meetings & Supplies	5,000	2,075	2,925
Strike Preparations	1,000		1,000
39016 Automatic Strike Fund Transfer (\$0.50 per m	16,257	16,256	1
Total Negotiations	26,423	18,331	8,092
MEETINGS & EVENTS	-		-
Executive Board Meetings	2,000	2,137	(137)
Steward/Council meetings	2,083		2,083
521 Party & other events	5,000		5,000
Advisory Board Meetings 3*@\$25k	6,250		6,250
Miscellaneous	167		167
Total Meetings & Events	15,500	2,137	13,363
REPRESENTATIVE DUES	-		-
52792 SEIU \$7.65 ea	370,204	413,651	(43,447)
49992 SEIU Unity Fund \$5.00ea	229,130	254,060	(24,930)
600 SEIU Retirees \$1.00ea	50	103	(53)
24 SEIU Associate Members-1.00	2	-	2
52792 SEIU/ State Council-\$2.53ea	122,433	135,424	(12,990)
20600 So Bay CLC \$0.55ea	10,386	11,078	(692)
4300 SMCO CLC \$0.60ea	2,365	2,329	36
7000 Fresno CLC \$0.45ea	2,042	2,874	(832)
7600 Bakersfield CLC \$0.25ea	1,583	2,124	(541)
6600 Monterey & Santa Cruz LC \$0.55ea	3,025	3,473	(448)
52792 CA Labor Fed 25% X .47ea	5,686	9,530	(3,844)
Building Trades-SMCO	300	300	-
Total Representative Dues	747,206	834,945	(87,739)
TOTAL EXPENSES	2,580,982	2,250,625	330,357
TOTAL INCOME LESS TOTAL EXPENSES	(228,342)	(10,510)	(217,833)
VOLUNTARY TRANSFERS	-		-
Building Funds	-		-
Strike Fund	-	-	-
Total Transfers	-	-	-
TOTAL INCOME LESS EXPENSES & TRANSFERS	(228,342)	(10,510)	(217,833)

EXHIBIT S

From: Norman Gleichman [mailto:Norman.Gleichman@seiu.org]
Sent: Tuesday, July 01, 2008 1:18 PM
To: Ridley, Eileen R.
Subject: RE: Local 715 v. SHC/LPCH - Documents To Be Authenticated

Dear Ms. Ridley:

I have reviewed your e-mail and the documents you have forwarded with your request that SEIU authenticate them.

First, I wish to reiterate SEIU's position, stated in SEIU's objection dated May 27, 2008, that the subpoenas do not comply with Rule 45(c) of the Federal Rules of Civil Procedure. As I understand it from your communications to date, the Court in this matter has permitted discovery on the narrow question of the existence of Local 715. You have not supplied me with the Court's discovery order, but I assume you have accurately described it.

It is well settled that no formal structure or financing arrangement is required to meet the definition of "labor organization" under the National Labor Relations Act. Thus, a group of employees can constitute a labor organization without officer elections or elected officials, membership meetings, a dues structure, or a set of bylaws. All that is required is employee participation for the purpose of dealing with employers over wages, hours, or terms and conditions of employment. *See, e.g., Sahara Datsun v. NLRB*, 811 F.2d 1317 (9th Cir. 1987); *Polaroid Corp.* 329 NLRB 424 (1999).

Against this backdrop, your subpoena goes far beyond the narrow area of inquiry open to you concerning the issue of the existence of Local 715. As just one example, the identity of the counsel selected to represent Local 715, a subject of the Hospitals' requests for production nos. 1, 20 and 21, is completely irrelevant to the question whether Local 715 exists. Without limitation, the same is true regarding financial transactions regarding Local 715, other SEIU local unions, or SEIU. See request nos. 19, 22-27, 56-57. In sum, these subpoenas constitute an obvious fishing expedition having nothing whatever to do with the question of Local 715's existence.

The subpoenas are also unduly burdensome, in violation of the Federal Rules. The requests are so broadly worded that they would require virtually every piece of written communication to Local 715 to be produced. See, without limitation, request nos. 5, 7, 8, 9 and 10. In this connection, you are advised that SEIU does not maintain a central filing system where documents are uniformly and systematically maintained according to subject matter or other categories. Instead, files and records are kept separately in SEIU's numerous separate departments and regional offices, as well as by individual staff members within those departments. The record retention policies, protocols and categories, if any, used in those separate departments and regional offices are not necessarily compatible. Additionally, a significant volume of SEIU files are not readily accessible because they have been boxed and transferred to an outside archive. Accordingly, the requests detailed herein and similar requests would require SEIU to spend countless hours locating and combing through thousands of separate, uncatalogued files maintained in separate Departments and offices, as well as to retrieve and review files boxed and stored in the

7/7/2008

outside archives, simply to determine whether they contain any material falling within the scope of the subpoena. This search would have to be performed manually. The expense to the SEIU in personnel time and archives retrieval charges would be enormous. The subpoena imposes a substantial additional burden on the SEIU in that its personnel would be precluded from carrying out the essential business of SEIU while deployed in the document search demanded by the Hospitals.

The sweeping scope of the subpoenas would force SEIU to divulge SEIU and its members communications on all issues, deliberations, and other activity protected by the First Amendment, including but not limited to SEIU's and its members exercise of the right to freedom of association and freedom of speech. Moreover, while the subpoenas would force the SEIU to mount an expensive, time-consuming records search, that effort will yield little, if any relevant material given the definition of labor organization under the NLRA.

Furthermore, as indicated in SEIU's objection, SEIU does not have custody of much of the documentation your subpoena seeks. I repeat that SEIU is not a party to these actions, and under the Labor Management Reporting and Disclosure Act is not the same labor organization as its affiliated local unions.

Nevertheless, without waiving its stated objections to the subpoenas, in an effort to reach agreement on issues raised by the subpoenas, SEIU further responds to your request as follows:

SEIU is agreeable to stipulating to the authenticity of the following documents:

- Order of Emergency Trusteeship dated June 8, 2007
- Form LM-15 Trusteeship Report
- Memorandum from Andrew L. Stern re: trusteeship of Local 715, dated June 8, 2007
- Notice of Hearing signed by Anna Burger dated July 12, 2007
- Memorandum from Andrew L. Stern re: IEB Decision on California Jurisdiction dated June 11, 2006

SEIU is unable to stipulate to the authenticity of the following documents for the reasons given:

- Letter from B.W. Smith to Laurie Quintel dated December 19, 2007. This letter was purported issued by Local 715, and Local 715 is the entity that would be in a position to authenticate this document.
- Letter from B.W. Smith to Laurie Quintel dated February 12, 2008. See comment above.
- Hearing Officers' Joint Report and Recommendations. The version you sent to me is unsigned.

Without waiving SEIU's previously stated objections to your subpoena, SEIU is producing herewith the following additional documents that are covered by the subpoena:

- Signed Hearing Officers' Joint Report and Recommendations dated June 9, 2006
- Order of Reorganization signed by Andrew Stern dated January 2, 2007
- Hearing Officer's Report on Local 715 trusteeship dated August 13, 2007
- Letter from Kristina Sermersheim to Andrew Stern dated June 4, 2007
- Letter to Bruce Smith from Andrew L. Stern dated June 8, 2007
- Letter to Clarence Dodge from George E. Fairchild dated March 2, 1972
- Letter to Bruce Smith from Anna Burger dated August 23, 2007
- Servicing Agreement between Local 715 and UHW
- Form LM-15 Trusteeship Report May 2008

SEIU will further stipulate that the hearing officers' reports attached hereto were duly approved by the SEIU International Executive Board.

With respect to taking President Stern's deposition, I am advised that President Stern will be out of the country between July 9 and July 20, and will not be available prior to his departure. However, I can make his assistant James J. Johnston available in his place. Mr. Johnston recently served as SEIU California Area Director and is currently Director of Union-Wide Programs. By virtue of holding these positions, Mr. Johnston is knowledgeable about the existence of Local 715. Mr. Johnston is available on July 10 and 11. Our preference would be July 10. Please note that Mr. Johnston may only be questioned on the narrow issue about which I understand the Court has permitted discovery: the existence of Local 715.

7/7/2008

With respect to Greg Pullman, you seemed surprised when I advised you that has been an International Union employee since November 2006. Yet Mr. Pullman testified to this in his deposition which the Hospitals took on March 22, 2007, at which he answered questions related to the 2006 SEIU reorganization in California. It would plainly be improper, oppressive and vexatious to depose Mr. Pullman again on the same issue. Please let me know specifically why the Hospitals seek to depose Mr. Pullman.

Yours,

Norman M. Gleichman
Deputy General Counsel

From: Ridley, Eileen R. [mailto:ERidley@foley.com]
Sent: Thu 6/26/2008 2:47 AM
To: Norman Gleichman
Subject: FW: Local 715 v. SHC/LPCH - Documents To Be Authenticated



Mr. Gleichman:

Per our conversation this week attached are documents we would request your client to authenticate which include the following:

June 9, 2006 Hearing Officers' Joint Report And Recommendations
□

June 11, 2006 memo from Andrew Stern to Affected SEIU Local Unions in California regarding the IEP decision on California jurisdiction

June 8, 2007 notice of appointment of trustee signed by Andrew Stern

June 8, 2007 memo from Andrew Stern to officers and members of Local 715 regarding appointment of trustee

July, 2007 Form LM-15 (Trusteeship Report) signed by Andrew Stern and Anna Burger.

July 12, 2007 Memo from Anna Burger, International Secretary-Treasurer titled "Notice Of Hearing Appointment Of Hearing Officer And Rules Of Procedure."

December 19, 2007 letter from B. Smith to L. Quintel reflecting copy sent to Norm Gleichman

February 12, 2008 letter from B. Smith to L. Quintel reflecting copy sent to Norm Gleichman
□

In addition, we need to have your client respond to the requests presented by the subpoena (obviously, if there are no responsive documents we will need a verified statement to that effect). Further, we are aware there are likely documents retained by your client which are responsive to the requests but are not included in the above request for authentication. In order to expedite this process, please let us know the quantity of responsive documents your client has. While your client's response was due on Monday, we have agreed to an extension of time. However, we will need a response by early next week.

Finally, as discussed, we will want to depose Mr. Stern and Pullman. In particular, Mr. Stern was involved in the creation of the trust regarding Local 715 which is a subject in this matter. Again, our focus is related to the existence and representation of Local 715 and the use of its resources, Please provide us with available dates for these proceedings. Thanks very much.



The preceding email message may be confidential or protected by the attorney-client privilege. It is not intended for transmission to, or receipt by, any unauthorized persons. If you have received this message in error, please (i) do not read it, (ii) reply to the sender that you received the message in error, and (iii) erase or destroy the message. Legal advice contained in the preceding message is solely for the benefit of the Foley & Lardner LLP client(s) represented by the Firm in the particular matter that is the subject of this message, and may not be relied upon by any other party.

Internal Revenue Service regulations require that certain types of written advice include a disclaimer. To the extent the preceding message contains advice relating to a Federal tax issue, unless expressly stated otherwise the advice is not intended or written to be used, and it cannot be used by the recipient or any other taxpayer, for the purpose of avoiding Federal tax penalties, and was not written to support the promotion or marketing of any transaction or matter discussed herein.

EXHIBIT T

SERVICE EMPLOYEES INTERNATIONAL UNION

**In re: SEIU Local Union Jurisdiction
in California for Long Term Care
Workers, Public Services Employees,
Public Health Employees, Property
Services Workers, and Private Sector
Workers in Public Sector Locals**

**Hearing Officers:
Alice Dale
Tom Balanoff**

HEARING OFFICERS' JOINT REPORT AND RECOMMENDATIONS

I. Introduction and Procedural Background

This is a joint report and recommendations to the International Executive Board ("IEB") of the Service Employees International Union ("SEIU") concerning the jurisdiction of SEIU local unions in California for long term care workers, public services employees, public health employees, property services workers, and private sector workers in public sector locals. The undersigned hearing officers were appointed by the SEIU Executive Committee¹ to hear this matter and render a report and recommendations concerning SEIU local union jurisdiction in California.

This proceeding commenced when International Secretary-Treasurer Anna Burger issued a Notice of Preliminary Hearing on January 30, 2006 (Ex. 2). On February 13, 2006, Secretary-Treasurer Burger issued a notice of the schedule of hearings and procedure proposed by the

¹ Pursuant to Article VI, Section 1(b) and Article XI, Section 6B of the SEIU Constitution and Bylaws, the IEB has delegated the appointment of hearing officers to the Executive Committee.

International Union (Ex. 3).² The notice contained six proposed rules of procedure. On February 17, 2006, a preliminary hearing was conducted in Burlingame, California, solely on the question of the schedule and procedures for the subsequent hearings on the substance of the jurisdictional questions. The purpose of that preliminary hearing was to get the views of local union leaders concerning the schedule and procedural rules proposed by the International Union. As a result of the preliminary hearing, modified rules of procedure were issued on March 13, 2006 (Ex. 8). The modified rules of procedure responded to local union comments and suggestions made at the preliminary hearing. In particular, the number of hearing days was doubled from four to eight, consecutive days of hearing were provided, the International Union was directed to establish a website to inform members about the issues involved in the jurisdiction proceeding, and one day of the hearings took the form of an audio conference with hearing locations in Sacramento, Fresno, Riverside, and San Diego.

The hearing process was designed to afford maximum opportunity for input from local union leaders and members on the jurisdictional questions. Hearings on the substantive jurisdictional issues were held on March 24 and 25 and April 27, 2006 in Los Angeles, on April 7 and 8, 2006 in Burlingame, on April 21 and 22, 2006 in San Francisco, and, via audio conference, on April 28, 2006 in Sacramento, Fresno, Riverside and San Diego. The hearings on March 24-25 and April 7-8, held by Sister Dale, dealt with local union jurisdiction for public services employees in Southern and Northern California, respectively, excluding public health

² Notices were sent to the following SEIU local unions: Locals 99, 24/7, 265, 280, 347, 415, 434B, 535, 614, 616, 620, 660, 700, 707, 715, 790, 817, 949, 998, 1000, 1280, 1292, 1877, 1983, 1997, UHW 2005, 2028, 2579, 4988, and 5000 NAGE.

employees and private sector workers represented by public sector locals. Hearings on jurisdiction for long term care employees were held on April 21 and April 27. The April 21 hearing also dealt with local union jurisdiction for California State University employees. On April 22, a hearing was held on jurisdiction for Northern California public hospital workers and private sector workers represented by public sector locals. In addition, the April 22 hearing dealt with jurisdiction for employees of the State of California, and property services workers (including cemetery workers, race track employees, private sector greens attendants, private university workers, and multi-service workers). A hearing on jurisdiction for Southern California public hospital workers and private sector workers represented by public sector locals took place on April 27. The hearings held on April 21, 22 and 27 were held by Brother Balanoff. All jurisdictional issues were addressed in the April 28 hearing by audio conference, held jointly by both hearing officers. Norm Gleichman, Deputy General Counsel of the International Union, assisted us at the hearings.

At each in-person hearing, local leaders and members were invited to submit post-hearing materials within 14 days of the close of the hearing on each jurisdictional issue. In addition, pursuant to the March 13 order on procedural questions, the International Union established a website with information concerning the jurisdictional issues covered by the hearings and the opportunities for members to participate. Members were invited to submit comments via the website, which were collected and made a part of the record.

Each affected local union that so desired was provided the opportunity to be heard during the hearing and to submit any documents that it wished us to consider. The following locals made presentations at one or more of the hearings: 24/7, 87, 121RN, 265, 280, 347, 415, 434B,

535, 614, 616, 620, 660, 700, 707, 715, 790, 817, 949, 998, 1000, 1280, 1877, 1983, 1997, 2028, 2579, 4988, and UHW. Many of the affected locals also responded in writing to the requests for information issued by the International Union in connection with the jurisdictional issues.

JJ Johnston, California Area Director, made presentations on the need for restructuring local union jurisdiction in California based on political and demographic developments and the need to grow the union in areas of the state where union density is low. John Tanner, Assistant Director of the Public Services Division, gave the Division's views on the need to restructure public sector jurisdiction in California, including the question whether public sector locals should have jurisdiction for public health care workers. Ian Campbell, Assistant Research Director for the Health Systems Division, gave a presentation on the Division's goals and the role of SEIU's United Healthcare Workers – West ("UHW") in the Division's plans. David Kieffer, Director of the Long Term Care Division, and Jon Barton, Deputy Director of the Division, stated the Division's views on the best way to organize ourselves to win higher standards for home care and nursing home workers. Eddie Iny, Assistant Director of the Property Services Division, gave a presentation on the opportunities and challenges facing property services local unions in California. Fifty-five exhibits were entered into the record at the hearings, a transcript of the hearings was made by the court reporters, and post-hearing submissions from a number of locals and individual members were received.

The entire record was considered in the drafting of this report. This report is the product of our collaborative efforts; however, we each concentrated on those issues covered in the respective hearings held separately by each of us.

II. The International Union's Policies on Organizing and Jurisdiction Established by the 2000 and 2004 Conventions

Article XIV, Section 3 of the SEIU Constitution and Bylaws authorizes the IEB to “consolidate or merge existing Local Unions under such terms and conditions as the [IEB] may determine when in the opinion of the [IEB] the interests and welfare of the International Union and the membership thereof will be better served by such action.”

Delegates to the 2000 SEIU Convention adopted the New Strength Unity Plan (“NSUP”) to build power for SEIU members. A critical part of the NSUP was a “Jurisdiction Policy and Procedure” set forth in the “Decide Report” prepared by the President's Committee 2000. The Decide Report was adopted by the 2000 Convention and incorporated in the NSUP. The Committee concluded that “industry-based jurisdiction gives local unions the best opportunity to be recognized by the public, elected officials, industry employers and workers as the principal voice of workers in that industry and geographic area.” SEIU members have told the union leadership that they want to be united with their co-workers doing similar work in the same geographic area so that they can exert maximum power to improve their working conditions. The policy of the International Union, as expressed at the 2000 Convention, is to combine members employed in a particular industry in a manner that mirrors the structure of that industry, minimizes fragmentation and, as a result, increases bargaining power. The focus on industry-based jurisdiction necessarily means that employees of the same employer are to be represented by the same SEIU local union.

In his testimony at the hearings, Brother Johnston explained that SEIU's program to refocus and restructure the Union to build an organization that is better positioned to win higher

standards for SEIU members began in 1996 with the “Bold Action” program adopted at the 1996 Convention, and continued with the 2000 Convention’s NSUP and the “Seven Strengths” program adopted by the 2004 Convention delegates. Among the elements of the Seven Strengths program are building local union strength, political strength, and industry strength. SEIU’s Policy on Jurisdiction contributes to the enhancement of all three of these strengths by fostering local unions with the size, capacity, resources and focus to win big for SEIU members in bargaining, and in the state capitals and Congress.

Brother Johnston testified that, in many states across the country, SEIU has consolidated and rationalized local union jurisdiction to create more powerful local unions. In California, Florida, Massachusetts, Connecticut, Maryland, Michigan, Missouri, Ohio, Pennsylvania, Rhode Island, and Washington, local unions have participated in a process similar to the one now underway in California. The results have been astounding: SEIU grew by 820,000 between 1996 and 2004.

This achievement was also due to our relentless focus on local union organizing. As part of the New Strength Unity program, the 2000 Convention adopted a local union organizing mandate that became Article XV, Section 16(a) of the SEIU Constitution and Bylaws. The organizing requirement was confirmed by the 2004 Convention. That provision states:

Every Local Union shall continue to implement an annual local union organizing budget equivalent to 20 percent of the local’s budget (after payment of all per capita tax obligations), to be spent consistent with the principles of the applicable industry division of the International Union. Each industry division shall submit its principles and the procedures for their enforcement for approval by the International Executive Board no later than January 2005.

Ex. 1, p. 31.

As part of the implementation of this requirement, the International Union divisions require locals to submit organizing plans on an annual basis. In addition, local unions are expected to have full-time organizing directors who are responsible for drawing up the locals' organizing plans and overseeing their execution.

Further, the Seven Strengths program adopted at the 2004 Convention includes a commitment to building national strength. A component of this commitment was expressed in the United Strategy for Strength resolution adopted by the Convention. This resolution commits the International Union and local union to devoting resources, including personnel, dedicated to growing the union in areas such as the South and Southwest, where union density, and SEIU's presence, has historically been weak. Through adoption of this resolution, the 2004 Convention mandated the International Union resources be redirected from areas of traditional strength, such as California and New York, to emerging growth regions.

III. Political and Demographic Trends in California

Brother Johnston, Brother Tanner, and Dean Tipps, Executive Director of the California State Council, made the case for the need to reorganize local union jurisdiction in California. Tr. 1056-64. They pointed out that, notwithstanding conventional political wisdom, California is not a "safe" state for candidates who support progressive positions of importance to working men and women. The data presented by these witnesses establishes that SEIU locals are strongest in the slower-growing coastal areas of the state such as San Francisco, Santa Clara, Los Angeles, and Alameda counties. These counties readily support agendas for working Californians; however, they are losing influence due the demographic shift to inland counties such as the

Central Valley counties and Sacramento, San Joaquin, Kern, San Bernardino, Riverside and San Diego counties, where the political climate is much more conservative, and SEIU is much weaker. SEIU is growing in California, but we are growing in the coastal areas where population growth is stagnant.

It is vital that we hit upon a strategy to unite workers in the inland counties within the same industry. In order to be able to organize successfully on a massive scale and affect the politics of these areas in a way which benefits our members by lifting standards, we must bring to bear the resources and expertise of our successful coastal locals. Currently, the vast majority of our organizing resources are concentrated in a few coastal county locals, and are mostly absent in strategic counties where growth and political power are on the rise.

IV. Current SEIU Local Union Jurisdiction in California

The evidence presented at the hearing dramatically highlighted the fragmentation of SEIU local union jurisdiction by geography, industry and employer. None of the four industry divisions (Public Services, Health Systems, Long Term Care, and Property Services) are unified under the present system of local union jurisdiction in California. The testimony revealed that many locals are quite small and therefore under-resourced. In addition, a number of locals still exercise jurisdiction across industry lines.

A. Current Public Services Local Unions

For purposes of this report, the term “public services local unions” refers to SEIU local unions whose membership is made up primarily of local or state government workers (including

California State University system employees). We address separately below, in a section devoted to Long Term Care Division members, home care providers considered employees of in home supportive services (“IHSS”) public authorities.

1. Local government employees

According to Brother Tanner’s testimony, 22 California counties have multiple public services local unions.³ Some of these local unions have jurisdiction for workers in a single county; others exercise jurisdiction in several counties. One public services local, Local 535, represents over 30,000 social services employees in local government statewide, and has members in many counties. Local 535 also represents private sector health care workers and workers employed by publicly-funded social service agencies. Other local government workers are represented by 19 local unions of vastly different sizes and resources (excluding Local 99, which represents Los Angeles area school employees). Some public services locals represent IHSS providers, property services workers, and private health care employees. We summarize below the jurisdiction exercised by these local unions for local government workers who are not represented by Local 535.

Los Angeles County employees are represented by Local 660, which represents over 51,000 employees of Los Angeles and Orange counties. About 19,000 Local 660 members are in the public health field, including those at the Los Angeles County Department of Public Health

³ These are the counties of Alameda, Contra Costa, Fresno, Kern, Los Angeles, Kings, Marin, Monterey, Napa, Orange, Riverside, Sacramento, San Diego, San Francisco, San Joaquin, San Mateo, Santa Barbara, Santa Clara, Solano, Stanislaus, Tulare, and Ventura.

Ingleside Hospital, Los Angeles County – USC Medical Center, Rancho Los Amigos National Rehabilitation Center, and the King/Drew Medical Center. Former Locals 434 and 787 previously merged into Local 660. Local 347 represents about 12,000 municipal workers in Los Angeles County, most of whom work for the City of Los Angeles. Local 2028, which was created as a result of the consolidation of former locals 102 and 1926, represents over 8,000 employees in San Diego County, and ten cities and school districts. Local 2028 also represents stadium and arena employees, theater and convention center workers, and workers at Delmar racetrack, who fall under the Property Services Division. In addition, Local 2028 represents employees of a Fredericka Manor, a private sector nursing home, and Edgemore, a county owned and operated nursing home. Employees of Riverside County, cities in the county, and special districts are represented by Local 1997, which represents about 6,000 public workers. Twenty-five percent of Local 1997's members are healthcare workers. Local 998, which is currently under trusteeship, represents about 5,500 employees of Ventura County (including Ventura County Medical Center) and various municipalities in that county, as well as workers for the courts, special districts, and IHSS workers.

Santa Barbara local government workers are represented by Local 620, which also represents public sector employees in San Luis Obispo county for a total representation of about 4,000. County and municipal workers in Kern, Tulare and Kings counties, including public hospital workers at Kern County Medical Center, are represented by Local 700, which represents over 7,000 workers. Local 700, which originally had jurisdiction limited to Kern County, is the product of a merger with former Local 690, which had jurisdiction for Tulare and Kings counties. Local 700 also represents employees of the San Joaquin Valley Air Pollution Control District,

which has employees who work in Bakersfield, Fresno and Stanislaus County. Local 817 represents over 5,000 workers in Monterey and San Benito counties, including city and county employees, IHSS providers, employees at Natividad Medical Center, a public hospital in Monterey County, and Hazel Hawkins Hospital, a district hospital in San Benito County.

Local government workers in Santa Clara and San Mateo counties are represented by Local 715, which represents over 26,000 employees. Some of Local 715's public sector members include employees of Santa Clara Valley Medical Center and San Mateo General Hospital. Local 715 also represents employees at El Camino Hospital, a district hospital. In addition, Local 715 has units in other SEIU divisions: private university workers at Stanford University and Santa Clara University (including Santa Clara Mission Cemetery workers), private hospital workers at Stanford and Lucile Packard Hospitals, IHSS providers, and multiservice workers employed by Bon Appetit/Compass who work at Stanford and Santa Clara universities.

Local 790 represents employees of cities, counties (including public hospitals), school districts, special districts, private non-profits, and other private sector employees (including airport service workers at San Francisco International Airport) in San Francisco, Alameda, Contra Costa, San Joaquin, and Sacramento counties. Local 790, which currently represents almost 29,000 employees, is itself the product of the mergers of former SEIU Locals 390, 400 and 22. In San Francisco, social services workers are represented by Local 535, and some public health classifications are represented by UHW. Specifically, UHW represents public health care employees at San Francisco General Hospital and the Laguna Honda public skilled nursing facility. UHW, Local 535, and Local 616 (which alone represents about 14,000 employees and

providers) also represent different classifications of local government workers in Alameda County, including employees at the Alameda County Medical Center. Local 616 also represents IHSS providers, employees of special districts, Head Start workers, and employees of one private non-profit. Santa Cruz local government workers, including both municipal and county employees, are represented by Local 415, which represents about 4,500 workers. Local 415 also represents IHSS providers, and is operating under a servicing agreement with Local 715. City, county school, court, special district, and child care workers in Marin County are represented by Local 949, which represents under 2,000 local government and related employees. Local 707 is an amalgamated local of about 6,000 county, special district, court, city, schools, IHSS, for-profit and non-profit contract agencies, and private sector hospitals workers, with jurisdiction in Sonoma, Mendocino and Lake counties.

Local 614 represents about 2,300 employees, including employees of Napa County, as well as employees in four cities in the county, school district employees, IHSS workers, and classified employees at Napa Community College. Local 614 has been in merger talks with Local 1280, which represents over 3,300 local government and related employees, as well as IHSS providers, in Solano County. Locals 1280 and 614 share an executive director. Local 1292 represents under 800 employees in cities, the courts, special districts, and publicly-funded private agencies in Butte, Shasta, and Siskiyou counties. Local 4988 has about 1500 members, 60% of whom work for the counties of Amador and Calaveras, cities, and special districts.

2. Education and State Employees

Employees of the Los Angeles, Lynwood, Torrance and Pleasant Valley unified school districts, Head Start workers, and Los Angeles Community College employees, are represented by Local 99, which is currently under trusteeship. Local 99 represents over 36,000 employees in Los Angeles and Orange counties. Local 1983, also known as California Faculty Association, represents 23,000 teaching faculty at all 23 campuses in the California State University (“CSU”) system. Non-teaching employees in bargaining units 2, 5, 7 and 9 in the system are represented by Local 2579, the California State University Employees Union, which represents over 15,000 CSU employees. Employees of the State of California in many bargaining units are represented by Local 1000, which represents over 83,000 state employees.

B. Current Long Term Care Local Unions

SEIU’s Long Term Care Division includes IHSS providers, homecare workers employed by private agencies, private sector nursing home workers, and employees of senior living facilities. In California, SEIU represents over 200,000 homecare workers and approximately 20,000 nursing home workers. SEIU’s nursing home workers are currently represented by three California local unions: Local 434B, which represents workers in 50 private nursing homes, UHW, which represents workers in 152 private nursing homes, and Local 2028, which represents workers at one private nursing home.

Homecare providers are in many different California local unions. SEIU represents IHSS providers in four types of unions. The bulk of the home care providers are represented by Local

434B, which represents almost 123,000 SEIU homecare members in Ventura,⁴ Los Angeles and San Bernardino counties. In addition, the Local 434B leadership heads Local 4034, also called the California United Homecare Workers Union (“CUHW”). Local 434B and CUHW share the same president and secretary-treasurer. CUHW is a California homecare workers union jointly affiliated with SEIU and AFSCME pursuant to the Strength In Unity Agreement between the two international unions. Ex. 38. CUHW represents over 22,000 homecare workers in 25 counties.⁵ Together, CUHW and Local 434B represent home care workers in 28 counties in Northern, Central, and Southern California. Local 434B and CUHW represent only long term care workers. Another AFSCME affiliate, the United Domestic Workers of America (“UDW”), represents about 60,000 IHSS providers in 10 counties.⁶ Over 46,000 IHSS providers in nine counties⁷ are represented by UHW, SEIU’s statewide health care union. In addition, as noted above, Locals 715, 616, 614, 415, 707, 998, 1280 and 817 certified representatives of IHSS providers in their respective jurisdictions.⁸

4 Local 434B has represented the Ventura County IHSS workers under a servicing agreement with Local 998. This group recently voted overwhelmingly to join Local 434B.

5 CUHW represent IHSS providers in Imperial, Inyo, Tulare, Kings, Mono, Madera, Mariposa, Tuolumne, Alpine, Nevada, Sierra, Sutter, Colusa, Lake, Glenn, Butte, Plumas, Tehama, Lassen, Shasta, Trinity Humboldt, Del Norte, Siskiyou, and Modoc counties.

6 Placer, El Dorado, Stanislaus, Merced, San Luis Obispo, Kern, Santa Barbara, Riverside, Orange, and San Diego.

7 San Francisco, Fresno, Marin, Sonoma, Contra Costa, Sacramento, San Joaquin, Amador and Calaveras.

8 Locals 616, 614, 707 and 1280 operate jointly through the Joint Organizing Partnership. Local 415 is party to a servicing agreement with Local 715, and Local 998 is party to a servicing agreement with Local 434B.

C. Current Property Services Jurisdiction

SEIU's Property Services Division includes janitors, security guards, employees of stadiums, arenas and convention centers, private higher education employees, subcontracted airport workers, and racetrack workers. The largest Property Services Division local union in California is Local 1877, which represents janitors, stadium and arena workers, convention center employees, subcontracted airport workers at all major California airports, grocery store cleaners, racetrack workers, residential building workers, cemetery workers, and employees in other allied industries. Local 24/7 represents security officers in Northern California. Local 265 represents cemetery workers and greens keepers. Locals 700, 715, and 535 also represent cemetery workers. Local 280, also called the Pari-Mutuel Employees Guild of California, represents pari-mutuel clerks throughout the state. As noted above, Locals 715, 790 and 2028 also represent small numbers of Property Services Division members.⁹

D. Private Hospital Workers Represented by Public Services Locals

UHW, the product of a 2005 merger between former Locals 250 and 399, is a large local of 130,000 members with statewide jurisdiction for private sector healthcare workers in California. At the time of the merger, Local 250 had about 94,000 members, and Local 399 represented over 30,000 workers. Yet there are also several public sector locals that represent

⁹ In addition, Local 87 represents janitors in San Francisco. Local 87 was not formally included in this proceeding, but a Local 87 representative testified at the hearing on property services jurisdiction.

private sector hospital workers. Local 4988 represents wall-to-wall units at Catholic Healthcare West's ("CHW's") Mark Twain hospital in Calaveras County, and the Sutter Amador acute care facility in Amador County. Local 707 represents employees at the Sutter Santa Rosa hospital. Local 715 is the certified representative of employees at Stanford and Lucille Packard Hospitals. Local 2028 represents employees at Children's Hospital in San Diego. UHW is actually servicing employees in these facilities represented by Locals 707, 715, and 2028 pursuant to servicing agreements. Finally, Local 535 represents about 3,400 registered nurses, other professional units, and technical employees employed by Kaiser Permanente.

E. Representation of District Hospital Workers

District hospitals are run by the elected boards of special healthcare districts. UHW represents workers at eight district hospitals. Workers at three other district hospitals are represented by public sector Locals 817, 715, and 5000 (NAGE).¹⁰

V. Organizing Programs and Results

Despite the impressive growth in overall SEIU membership over the past decade, only a relative small percentage of that growth has been due to organizing wins. According to a submission from the Public Services Division, during the period 1998 through 2005, California public sector unions (include those representing state workers and school employees) organized just 75,161 new workers. This number includes 23,500 added in 2000 and 2004 by California

¹⁰ NAGE represents employees at Meniffee district hospital in Riverside County.

Faculty Association, Local 1983, through an agency shop campaign and accretion of teacher aides. Among local unions whose focus is local government workers, the organizing wins for this period amounted to only 48,494 new members.

Many public sector locals are not contributing at all to our California growth, and those that are contributing are not winning at the pace needed to achieve union density in our priority services and geography. Our annual average growth per local union over the past 6 years is 368 workers. A disproportionate amount of that growth results from our current membership base: agency shop, residual and part-time worker victories. We are not organizing on pace in services that were formerly publicly-delivered and are now privately-delivered, publicly-funded such as mental health and developmental disabilities workers. Only two local unions have achieved a measure of union density in mental health services.

We are also not growing on pace in other Public Services Division priority services such as childcare. These privately-delivered, publicly-funded services are severely underfunded resulting in unreliable access and service quality and poverty level workforce wage and benefit standards.

Why are our growth numbers in the California public sector so anemic? It is true that many opportunities for growth lie in localities where existing local government local unions don't have sufficient resources to mount large-scale organizing drives. For example, the Public Services Division estimates that, in Tulare County, there are 1,800 workers, including residual public units, hospital district employees, child care centers and mental health workers, who could be organized immediately. This figure does not count an additional 1,000 developmental

disability community workers who could win the right to union representation in the near future given new political leadership in Sacramento. This fact further underscores the necessity to realign our jurisdiction to bring local union resources to bear in those localities of low union density.

But the geographic imbalance in our present local union structure does not fully explain the mediocre growth of our public sector local unions. Even in 2006, many public sector local unions are not “on program” with respect to SEIU’s organizing mandates. For example, many of our public sector local unions are simply too small to be able to devote the resources required to fund full-time organizing directors. Thirteen of our California public sector locals represent less than 10,000 workers, and nine represent less than 6,000 public employees. The Public Services Division reports that eight local unions are not contributing to our growth goals due to lack of capacity and/or political will. To address this problem, some locals have banded together to jointly organize, in what amounts to a partial step toward consolidation. Specifically, Locals 707, 614, 1280, 1292 and 949 formed the Joint Organizing Partnership (“JOP”) with Local 616. The JOP is led by Local 616’s organizing director. Similarly, Local 4988 receives organizing services from Local 790 through their servicing agreement. But Locals 2028, 1997, 998, 700 and 817 do not have organizing directors.

Local 347 represents about 12,000 workers, yet it too lacks a full-time organizing director. According to the Public Services Division, the person listed as the organizing director is actually the local’s fulltime political director. In addition, Local 347’s organizing plan for 2006 does not comply with SEIU’s organizing mandate. The Division reports that the three staff listed as organizers are actually representatives. The Division explains that, in 2005, the local

assigned responsibility for its organizing program to its General Counsel in order to recruit a fulltime organizing director and staff and to develop a viable organizing program. The Division points out that this was not done, and that, as in 2006, the three staff listed as organizers in 2005 were actually representatives.

In addition, Local 347 continues to struggle with maintaining its membership base. The Division reports that, on April 24, 2006, the local informed its members employed by the City of Commerce that it was withdrawing from the ballot rather than face a decertification election challenge from the Commerce City Employees Association. Similarly, during the hearings, a decertification challenge to Local 347 in a large unit from a public safety union affiliated with an AFL-CIO union was only averted after the local called on the International Union for assistance. The Division reports that there are 119 independently-represented cities in Los Angeles and Orange counties employing over 5,000 employees for which Local 347 has no organizing plan or dedicated resources.

Our organizing shortfalls extend beyond the Public Services Division. The goal of Health Systems Division is to build a strong national union to change the lives of RNs and hospital workers, to hold hospitals accountable to workers, patients, the underserved, and communities, to improve the quality of care delivered, and to win health care for all. Assistant Research Director Campbell testified that the biggest challenge to achieving these goals is the current low union density in the industry. Tr. 1898-1908.

Brother Campbell submitted data showing the job we have before us in the private hospital sector in California. Statewide, fully 78% of hospital beds are in private facilities, and of these, 39% are in totally non-union facilities. In the markets identified as growth markets by

the Health Systems Division, significant percentages of non-union facilities exist. In the Fresno County market, private hospitals make up 95% of hospital beds, and 52% of those beds are in non-union facilities. There is also a non-union district hospital in Fresno County. In Orange County, 93% of hospital beds are in private hospitals, of which 73% are in facilities where no union is present. In San Diego County, private sector hospitals have 65% of the total hospital beds in the county, and 33% of those beds are in non-union hospitals. In addition, 52% of the district hospital beds are in non-union facilities in San Diego County. In Riverside County, 68% of the hospital beds are in private sector hospitals, of which 35% are in non-union facilities. And in San Bernardino County, private acute care facilities make up 84% of the hospital beds in the county, with 59% of them located in non-union hospitals. In addition 175 of the 199 district hospital beds in that county are in non-union facilities.

Based in part on the above data, the Health Systems Division estimates that there are approximately 100,000 unorganized hospital and related workers in Southern California. The Division's plans call for organizing more than 40,000 private and healthcare district healthcare workers in California over the next four years. These are mostly professional and technical workers. The Division is targeting district hospitals, private profit and private non-profit hospitals in markets in Fresno, Orange, Riverside, San Bernardino and San Diego counties. For 2006, the Division's plans call for organizing 6,000 workers in private sector and district hospital targets in California. These include workers in hospitals and related facilities in the Kaiser, CHW, Tenet and Sutter chains and district hospitals where some of the workers are already in unions.

UHW is the key to the Health Systems Division's organizing plans. UHW is the only local union with jurisdiction to organize private sector healthcare workers in California. And although it currently shares jurisdiction for district hospital workers with public sector unions, UHW represents employees seven district hospitals, far more than any other SEIU local union. Yet, UHW has also failed to keep pace. Since the 2005 merger of 250 with 399, UHW has only organized about 2200 hospital workers. It is plain that UHW has much further to go in organizing its current jurisdiction.

VI. Discussion and Recommendations

It is stating the obvious to say that the current patchwork of SEIU local union jurisdiction in California is not designed to maximize local union strength through uniting workers by industry in the most relevant geography. Rather, the current jurisdictional patterns are in large part an outgrowth of piecemeal affiliations, mergers, and special arrangements that do not reflect the current needs of SEIU members to win significant improvement in standards, preserve gains previously won, and grow the union in areas of low union density. We emphasize that such growth is not growth for growth's sake; it is vital if we are to retain the standards we have won in areas of higher union density. We simply cannot be islands of strength in a sea of weakness; we must improve standards throughout the state so that employers cannot use lower standards in the unorganized areas of the state to attack wages and benefits in the locations where we are a significant presence. And as the testimony established, we must increase our statewide clout to promote a progressive agenda and to head off efforts to block that agenda through initiatives such as Proposition 75, which we only managed to defeat by a narrow margin. As pointed out by

Brother Johnston, SEIU devoted substantial resources to that campaign to just to maintain the status quo. To accomplish this, we must project our strength into the eastern part of the state, where political power is migrating in step with population growth. We must also take a hard look at what the relevant geography is for each industry division, and be prepared to match our structure to that geography, irrespective of the current jurisdictional hodgepodge.

In addition, we need to take stock of the inability of many locals in their current configuration to adhere to the organizing mandates of SEIU. We think that it will take new internal structures and locals of larger size to establish properly-resourced organizing programs geared to the 21st century. Our outdated structure in California has not produced the kind of organizing results we will need to have across the state if we are to keep standards high, grow the union, and win for our members. These principles underlie our recommendations for jurisdictional realignment in California.

The imperative of creating new local organizations that are not only self-sustaining, but that can devote resources to organizes in the growth areas, also flows from the current practice, of divisions subsidizing local organizing work. Notwithstanding the United Strategy for Strength resolution adopted by the 2004 Convention, the Public Services, Property Services, and Long-Term Care Divisions are currently subsidizing organizing campaigns in California. This needs to change if we are serious about our commitment to commit resources to unionize the “red” states.

We emphasize that our California locals are already no strangers to consolidation and realignment. As detailed above, many of the local unions involved in these proceedings are themselves the products of earlier consolidations. We are recommending an intensification of

that process to permit SEIU to exercise the maximum leverage possible on behalf of our California members.

Because the thorniest issues we address relate to the appropriate jurisdiction for healthcare workers, we turn preliminarily to the contention made by UHW that all healthcare workers, broadly defined to include public health workers and long-term care employees, should ultimately be placed in a single local union. We do not think that the record of healthcare to date demonstrates that this is necessarily the best approach for growth. We believe that the jury is still out on the question whether, in order to raise standards and build power for our members, we need to amalgamate all of the sectors of the broadly defined healthcare world into a single entity. This has not been our uniform structure for representing members in the different sectors of the healthcare industry, and, as a matter of fact, recent jurisdictional decisions have resulted in recommendations for different structures based on different density, geography, capacity, and growth possibilities in each case. For example, although in New York all healthcare workers are in one local, it is not as a result of International Union jurisdictional decisions, but rather through voluntary mergers, except for interns and residents who are still in a separate local. Jurisdictional decisions in Illinois and Washington have resulted in sectoral structures, and there are sector-based locals in Oregon, Wisconsin, and Pennsylvania.

A. Jurisdiction for Local Government Employees

1. Proposals for Geographic Reorganization

By memorandum dated March 17, 2006, prior to the opening of substantive hearings in this matter, the International Union circulated a concept for reorganizing public sector

jurisdiction in California for local government workers. Ex. 10. The proposal covered public sector locals except Locals 99, 1000, 2579, 1983, and a future childcare local contemplated to be jointly affiliated with AFSCME. The key element of the International Union's proposal was a map of the state with four regions designated by ovals running from north to south. The ovals, often referred to during the hearings as "eggs" due to their shape, represented four regional public sector local unions that the International Union proposed be established in lieu of the existing arrangement of 19 separate local unions. The map was more of a framework than a precise blueprint; the four regions were generally delineated, but at the periphery of each oval there was some ambiguity. Two counties, San Francisco and Alpine, did not appear to fall within any of the regions, while counties at the borders of the proposed new locals, such as San Joaquin, Kern, and Riverside, appeared in two ovals. For purposes of this decision, we refer to the four proposed regional locals as the Northern, North Central, South Central, and Southern regional public sector locals.

Local representatives who testified at the hearings generally recognized the need to consolidate small local unions and reorganize public sector jurisdiction along regional lines, although there were different views expressed about the precise makeup of regional configurations. Locals 2028, 660, 1997, and 715 explicitly or implicitly supported the four-local model proposed by the International Union. Local 620 proposed a fifth local to be comprised of three coastal counties (Santa Barbara, Ventura and San Luis Obispo) plus five Central Valley counties (Tulare, Kings, Kern, Inyo and Mono). Local 700 endorsed this proposal, but added a ninth county, Fresno, in a post-hearing submission. At the hearing itself, Local 700 proposed an alternative Central Valley local consisting of Kern, Kings, Tulare, Fresno, Madera, Mariposa,

Merced, Stanislaus, and possibly also San Joaquin. In addition, Local 700's Executive Director, Ward Wollesen, testified that Inyo and Mono counties, on the eastern side of the Sierra Nevada range, would logically fit with Local 700's jurisdiction. Brother Wollesen stated the local's preference to be in a local representing other Central Valley counties rather than a local headquartered in Los Angeles or San Francisco.

Local 715 (Santa Clara and San Mateo counties) urged that San Joaquin County be placed in the North Central regional local, while Local 790 presented testimony from San Joaquin County members who desired to remain with Local 790. Local 817 (Monterey and San Benito counties) came out in favor of a single statewide local union for public sector workers, to be achieved in phases. Under Local 817's proposal, there would be an initial consolidation of public sector local unions into two regional locals, one in the north and one in the south. The northern boundaries of San Luis Obispo, Kern, and San Bernardino counties would be the dividing line between these two proposed locals. According to the proposal, presented by Local 817 Executive Director John Vellardita, these two locals would then be merged within five to seven years to form a single statewide public sector local. Local 949 (Marin County) proposed a Northern California provisional local covering the jurisdictions currently exercised by Locals 790, 616, 707, 1280, 614, 4988, and 1292. According to Local 949 Executive Director Kris Organ, this Northern California provisional local would encompass San Francisco, Alameda, San Joaquin, Calaveras, Tuolumne, Mono, and all counties north of those counties.

Locals 535 and 616 proposed three public sector locals. Local 535 Executive Director Damita Davis-Howard's description of the proposed Northern California provisional local was similar to Local 949's proposal, and included the members serviced out of Local 535's Oakland

and Sacramento offices, including the State Bar (a statewide employer), San Andreas Regional Center (located in the South Bay), and Valley Mountain Regional Center (located in multiple counties including San Joaquin and Stanislaus), as well as Local 535 members serviced out of Local 535's San Jose offices that are located in Alameda County and north of San Mateo County. Sister Davis-Howard further testified that the Central California local include all of the jurisdictions currently represented by Locals 415 (Santa Cruz County), 700 (Kern, Tulare and Kings counties), 715 (Santa Clara and San Mateo counties), 817 (Monterey and San Benito counties), plus all Local 535 members serviced out of its San Jose office, with the exceptions of members working in Alameda County and north of San Mateo County and the regional center employees she listed as part of the Northern California local. Local 535's proposed Southern California public sector local would include all of the jurisdictions currently represented by Locals 347, 620, 660, 998, 1997, 2028, and all Local 535 members serviced out of Local 535's Pasadena, San Diego, and Santa Barbara offices. This would include the counties of Los Angeles, Ventura, Santa Barbara, San Luis Obispo, Riverside, Orange, San Diego, Imperial, and San Bernardino. Local 2028 Executive Director Ben Monterroso, while supporting the 4-egg concept, testified that Orange County should be added to the jurisdiction of the southernmost local.

Only one local, Local 347, opposed fundamental changes to its current structure. Representatives of Local 347, which represents about 12,000 municipal employees employed by the City of Los Angeles and other cities in Los Angeles and Orange counties, took the position that city workers have unique issues and interests and that city and county workers should not be in the same local union.

Locals urged that various principles be adhered to in the course of our consideration of the public sector jurisdictional questions. Local 535 presented a comprehensive list of eight additional recommendations to guide SEIU during any reorganization. These were: the creation of new local unions rather than the merger of locals into existing local unions; the creation of an advisory body to assist with transition and implementation issues; ensuring operational continuity; creation of industry councils; restructuring of other SEIU bodies that support public sector locals in California; providing full employment for staff; allowing all members to vote on the hearing officers' recommendations; and preservation of the history and culture of the current public sector locals. Ex. 12. In addition, at the hearing, Sister Davis-Howard urged that, in consolidating existing local unions to create new entities, existing locals be moved in their entirety into the new locals, rather than being divided up and assigned to different regional locals. Tr. 130, 134-35.

Many of the suggestions of Local 535 were echoed by other locals. In particular, locals and members emphasized the need for members to vote on the reorganization plan, the importance of maintaining staff and offices in local communities where existing local unions maintain a presence, the necessity of honoring staff contracts, the benefits of establishing new ("provisional") local unions instead of merging locals into existing unions, and the importance of creating a member advisory committee charged with laying out democratic governance structures, dealing with dues, staffing and office location issues, and establishing statewide industry councils to bring together SEIU members doing similar work across regional locals.

2. Proposals for Public Healthcare Workers Jurisdiction

One focus of the hearings was the question whether jurisdiction for employees in public healthcare facilities should go to public sector locals or to UHW. By “public healthcare workers” we mean employees of public hospitals, public nursing homes, and related facilities, including healthcare workers in clinics, prisons and health departments.

UHW President Sal Rosselli and other UHW representatives and members testified that, in general, public hospital workers belong in a local union focused on healthcare. Tr. 1938-78. Brother Rosselli stated that the common healthcare industry was more important than the common employer. UHW argued that hospitals form a distinct sector, with common legal requirements, managed care contracts, technology and clinical practices. UHW stressed that the care delivered and the work performed are the same in privately run hospitals as in public hospitals. UHW emphasized that, compared with other public employees, hospital workers are distinguished by the requirement for advanced education, licensing, certification and continuing education, the highly regulated environment in which they operate, exposure to toxic substances, infectious diseases, and higher rates of injuries, unique scheduling issues and unique staffing issues.

UHW noted that the counties’ portion of funding was relatively small, ranging from 21.9% in San Francisco to 2.6% in San Joaquin County. UHW made the point that public sector healthcare workers identified themselves as healthcare workers first, and county workers second. Brother Rosselli pledged to bring the same high standards UHW has won for private sector hospital workers at systems like Kaiser to public hospital workers. UHW noted that many healthcare job classifications were common across the public and private sectors. UHW

representatives argued that UHW's knowledge of the healthcare industry and workplace issues common to all healthcare workers would be at the service of public hospital workers if they were in the same union – UHW.

While stating its general position that public hospital workers belong in UHW's jurisdiction, UHW also acknowledged that a county-by-county analysis was warranted, with the yardstick being a determination of which local could most effectively represent the interests of public healthcare members. Brother Rosselli testified that, because public healthcare workers form a substantial portion of the membership of Local 660, and because Local 660 has done an excellent job in winning high standards for its public hospital members, Local 660 should retain jurisdiction for its public hospital members. In a post-hearing submission, Brother Rosselli requested that UHW be granted jurisdiction for public hospital workers in Alameda, San Francisco, and Monterey Counties. He argued for a case-by-case approach with respect to jurisdiction for SEIU members employed by public hospitals in other counties, and for employees of all public hospitals in which SEIU currently does not have membership, including all hospitals affiliated with the University of California, in the event that AFSMCE transfers those members to SEIU at some point in the future.

Brother Vellardita, on behalf of Local 817, testified in support of UHW's position. He stated that Local 817 was not as well positioned as UHW is to win higher standards for workers at the public hospital in Monterey County. Brother Vellardita testified that Local 817 lacked the knowledge of the industry that UHW has acquired through its representation of private sector hospital workers. He emphasized that medical economics trumps the single employer – single

union approach because relationships with county officials cannot ultimately overcome the dictates of the healthcare industry market.

For its part, the Public Services Division took the position that public sector local unions should have jurisdiction for public healthcare workers. Tr. 1908-20. Assistant Division Director Tanner testified that placement of public hospital workers in public sector unions would promote industry strength, because public health workers and other public workers in the same community share the same employer, and community strength, because public health members work shoulder to shoulder with other public services workers to build safe and healthy communities. Brother Tanner pointed out that healthcare workers represent a substantial portion of the membership of public locals. He asserted that health services are just one of many types of services provided by county workers, including social services, public safety, property services, and transportation, none of which ought to be removed from the jurisdiction of public sector locals. He stressed that, because the county is the single employer for public healthcare workers and other employees of the county, placing these members in the public sector local is the only way to uphold the principles of “One Employer – One Union” and “Speaking with One Voice.” Brother Tanner emphasized that major benefits for all county workers, including health insurance, pension, retiree medical, and vacation, tend to be the same for all workers, with the exception of public safety employees. He also stated that public sector locals will have the capacity and experience to carry out the political work at the state and federal levels that impact county government expenditures on public health needs.

The Public Services Division presentation also pointed out the practical difficulties of attempting to split off representation of public health workers from other county workers.

Brother Tanner explained that bargaining units for all but one county are cross-departmental. He remarked that, in unit determination decisions, the largest possible bargaining units are favored, with the goal of avoiding fragmentation and the proliferation of smaller bargaining units. Josie Mooney, Local 790's Executive Director, and other representatives and members of Local 790, echoed this proposition. Sister Mooney presented evidence that 33 job classifications in the San Francisco Department of Public Health were located in other City of San Francisco departments. Tr. 2077-78. She noted in particular Clerks, Transcriber Typists, Account Clerks, Health Care Billing Clerks, and Senior Telephone Operators, all of whom are covered by the same contract and are in the same bargaining unit whether inside or outside of the Department of Public Health (Ex. 53).

Similar testimony was given by Kristy Sermersheim, Executive Secretary of Local 715, Brother Wollesen on behalf of Local 700, Mark Kisselburg, an executive board member of Local 1997, and Annelle Grajeda and Steve Matthews, General Manager and Director of Health Operations, respectively, of Local 660. Tr. 1929-38, 2013-34, 2092-2100. Brother Matthews testified that Los Angeles County's workforce is highly integrated with many classifications of workers working in many different county departments, including the Department of Health Services ("DHS"). For example, according to Local 660, 20 of 22 Los Angeles County departments (including DHS) employ intermediate clerks, and 16 departments (also including DHS) have Warehouse Worker Aids. Nurses work in eight county departments in addition to DHS. The collective bargaining units and contracts covering these common job classifications span departmental lines. Local 660's official positions was that public healthcare units belong in public sector unions (Ex. 54).

Moreover, Brothers Wollesen and Kisselburg pointed out that it was unlikely that the union could unilaterally remove healthcare workers from common bargaining units with other county workers. They stressed that the counties had an interest in the makeup of the bargaining units and were unlikely to agree to the removal of these workers from the broader county units. Grace Corse, a Registered Nurse and chair of the combined Los Angeles County RN bargaining units for Local 660, testified that nurses identified with their fellow county employees and did not wish to be divided from them in a separate local union. Tr. 2039-41. She asserted that RNs benefited from the public sector locals' fight for safe staffing levels. Other health care members of Local 660 and 790 gave similar testimony. Sister Grajeda emphasized that health care members contribute greatly to the local membership as a whole, and also benefit from their unity with other county workers in the local. Brother Wollesen pointed out that the goal of creating larger, effective regional public sector locals would be undermined by removing public health workers, such as those who work for Kern Medical Center, from the public sector locals. He added that public health workers' pay and benefits are protected by the fact that they are currently inextricably linked to the pay and benefits for workers countywide.

Further, Sisters Davis-Howard, Mooney and Fran Jefferson, Executive Director of Local 616, testified that at Alameda County Medical Center, Laguna Honda Hospital, and San Francisco General Hospital, where multiple SEIU local unions represent employees of the same employer, relationships among the local unions have been difficult, and bargaining coordination has not always gone smoothly. Tr. 2084-86. Sister Mooney described two occasion on which Local 790 and UHW took opposite positions on issues being discussed with the San Francisco Department of Public Health. Sister Davis-Howard noted that, frequently, the locals were

obliged to call in assistance from the International Union to referee disputes among the locals during contract negotiations. Tr. 2001.

The Public Services Division also contended that public health systems constitute a separate sector, as evidenced by the fact that public hospitals have their own association, called the California Association of Public Hospitals, which is separate from the association for private hospitals. Along these same lines, the Division stressed that public health systems have a fundamentally different mission than do their private sector counterparts: to provide indigent care and psychiatric emergency care, and to serve the entire community, irrespective of ability to pay. For instance, Brother Tanner testified that public hospitals provide 85% of the indigent care in counties where they operate and serve a patient population that is 76% people of color, despite the fact the public hospitals make up only six percent of California hospitals.

3. Proposals for District Hospital Jurisdiction

Another issue to be resolved in this proceeding is jurisdiction for district hospital employees. Healthcare districts were created after World War II in California to address the problem of a shortage of hospital beds in the state. Healthcare districts are governed by elected boards. Most health care districts in California are purely public. Some have a two-board, district-private structure. In one or more of these cases the public board retains majority control of the private board. A minority of the district hospitals are affiliated with chains or managed by management companies. Examples of this are Oak Valley Hospital, managed by the Catholic Healthcare West chain, and Marin General Hospital, managed by the Sutter hospital chain.

District hospitals serve as safety net providers, including significant care for uninsured and underinsured residents. Healthcare districts are the chief source of inpatient, outpatient and emergency care to rural residents and residents in agricultural, fishing, mining and timber areas. There are 47 district hospitals, of which 31 are rural. Fifteen districts have hospitals operated by private companies. Eighteen districts provide health services but do not operate hospitals.

Some district hospitals have changed their governance from public to private. However, recent conversions in control of district hospitals have been from private to public. Examples are the creation of a healthcare district to rescue Alameda Hospital,¹¹ the leasing of Doctors' Hospital Pinole to the West Contra Costa healthcare district, and the switch in control of Palo Verde Hospital in Blythe from LifePoint Hospitals to the Palo Verde healthcare district.

County governments play an indirect role in the operations of healthcare districts and their hospitals. Counties approve the formation of the healthcare districts and appoint the first district board. County treasurers may act as the district treasurers and assess, collect and distribute property taxes to the districts. However, the districts have their own bonding and taxing authority to finance both operations and capital. Under California law, district hospital workers are considered public sector employees. They are covered by the Meyers-Milias Brown Act, the collective bargaining law for local government workers, and participate in public pension systems.

Healthcare districts are one type of special district, but there are others. Examples of other types of special districts are sanitary districts, water districts, recreation and park districts,

¹¹ It was explained at the hearing that Alameda County Medical Center has a unique governance structure that does not precisely fit the district hospital or public hospital models.

and community services districts. Public services locals represent workers at 68 special districts (not including education). Public services locals organized 11 new special districts in the past five years. There are approximately 4,300 healthcare district workers unorganized in SEIU targeted counties in California.

UHW and Local 817 argued that UHW should have jurisdiction for district hospitals. UHW emphasized that district hospitals, although nominally public, behave more like private sector hospitals and are beyond the control of local government officials. Brother Vellardita added that Local 817 did not have the expertise in representing health care workers to win the highest standards for members at the district hospital it has organized (Hazel Hawkins Hospital), and asserted that UHW would be better placed to represent those members.

The Health Systems Division did not directly address the jurisdiction issue concerning district hospitals. However, as discussed above, the Division's presentation made clear that the Division included the organization of district hospitals as part of its plan to organize the healthcare industry in California.

The Public Services Division, Local 715, and Local 1997 urged us to recommend that public sector locals be given jurisdiction for district hospitals. Sister Sermersheim stressed that public sector entities like district hospitals belong in public sector unions. In urging that public sector locals have jurisdiction for district hospitals, Brother Tanner underscored the difference between district and private hospitals in terms of mission, payer mix, and governance, and likened healthcare districts to other special districts whose employees are represented by SEIU local unions.

4. Proposals for Southern California Education Jurisdiction

Local 99 Deputy Trustee Bill Lloyd requested that Local 99 be granted jurisdiction for education employees in the same geographical area as that covered by the South Central regional public sector local union. In a post-hearing submission, Brother Lloyd argued that the education employers form a separate sector of public employees that justifies a separate local union.

Brother Lloyd stressed that Local 99 represents the lion's share of school employees in Southern California. He asserted that, with over 30,000 members, Local 99 has sufficient size to be an effective local union with adequate resources to organize more education employees and lift standards for those already represented. Brother Lloyd pointed out that, in addition to an anticipated agency shop campaign that should add 10,000 Los Angeles Unified School District ("LAUSD") Unit G workers to the ranks of fee payers or members, Local 99 is targeting LAUSD community representatives, and will focus on early education employees and workers in public and private charter schools. Brother Lloyd noted that a June ballot proposition, if passed, will make preschool available for all 4-year olds in California, and would result in thousands of new SEIU Local 99 members filling jobs that will be created by this initiative.

Brother Lloyd stressed that, unlike other local government employees, school employees are not covered by the Meyers-Millias-Brown Act. Instead, school employees are subject to the provisions of the Education Code and the Educational Employment Relations Act of 1976, which established collective bargaining in California's public schools and community colleges. He noted as well the unique set of players that shape policy and funding in the education arena, including the California Teachers Association and the California School Employees Association.

5. Recommendations for Local Government Jurisdiction

a. General Principles

The current fragmentation of local government jurisdiction and representation is simply inadequate to meet the needs of SEIU members in the 21st Century. We must be bold and recognize the need to change ourselves and our union if we expect to stay ahead of the curve as government and industry change all around us. Our 600,000 California members should provide us with greater clout in improving their lives than we have thus far been able to bring to bear on the employers and political bodies with whom we must deal. At the outset of this discussion of public sector jurisdiction, we state an overriding principle: we need larger, stronger local unions in the public sector that can focus on growing the worker voice for workers within the jurisdiction of the Public Services Division, including the 100,000 developmental disabilities workers and 40,000 mental health workers in California. These new local unions are also needed to grow our traditional public worker presence in cities and counties in the conservative, fastest-growing areas of the state. In short, we are convinced that the time for significant change is now.

Accordingly, we recommend the creation of four new local unions with jurisdiction for local government employees. We find the proposal to combine 19 local unions representing public sector employees into one or two local unions to be overly ambitious as a first step. The melding of 19 different local union cultures, personnel, collective bargaining responsibilities, and political orientations into four local unions will be a major undertaking. As Bill Steck, Executive Director of Local 707, stated, we must be careful to do the job right. It may be that, at some point in the future, it will make sense to further consolidate our California public sector locals

into two or even one local union. For now, however, we recommend adopted of the “four egg” approach.

In this connection, we note that Locals 535 and 620 questioned the viability of a San Diego based local. Tr. 132-33, 189. It is true that a San Diego public sector local, even with the Local 535 members and jurisdiction in Imperial County, might not have the size and therefore the resources necessary to assure rapid expansion into the northern and eastern portions of the two-county area. However, given that San Diego is the second largest city in California, and that Imperial County is slated for growth, we think that, as of now, the prospect of a Southern public sector local based in San Diego and with jurisdiction in Imperial County is worth pursuing. As indicated below, however, we also recommend that this jurisdictional arrangement, like the others we recommend today, be revisited in the future so that a determination may be made whether these new regional public sector locals are organizing, growing, and engaging in political action at the high level we expect.

We agree with the suggestion of Brother Steck and Sister Davis-Howard to create what they each termed “provisional locals.” By this we understand them to mean that new public sector unions should be chartered, as opposed to merging existing local unions into other existing locals. We agree that this will enhance the prospects for cooperation from all members and leaders of existing locals, and will provide a real opportunity for a fresh start in terms of developing local union structures that will meet the needs of our California members now and in the future for strong, resource-rich, democratic unions with expansive reaches into all parts of California.

Whether or not the creation of four regional locals leads to further consolidation along the lines proposed by Local 817, we think these new locals should closely cooperate with each other and share operations where possible. For example, the new locals may be able to realize economies of scale and improve efficient delivery of member services by jointly carrying out “back office” administrative or representational functions.

From what we have said thus far it should be clear that we do not think a stand-alone municipal workers local union such as that urged by Local 347 makes sense. Our experience in virtually every public sector union in California is that city workers and county workers are together in the same local unions, and that each group gives strength to the other. For example, Local 715 represents over 1,500 municipal workers and nearly 11,000 county workers, and Local 620 represents about 1,200 municipal workers and over 2,200 county workers. Representatives of public locals emphasized the benefits of combining the strength of municipal and county employees. Matthew Nathanson, Acting President of Local 415, testified that there are many similarities in job classifications between city and county workers. Tr. 682. He also noted that the person “who is on the City Council may be the person who is on the Board of Supervisors tomorrow.”

Moreover, Local 347’s own experience demonstrates that it has grown in part by merging formerly independent associations into the local union. These independent associations are far smaller than Local 347, but nevertheless decided that they could unite their strength with other public workers in a much larger organization and still retain a degree of local control. There is no reason why the same cannot be true of Local 347 itself, which will be far larger in proportion to the new South Central regional local union than the independent associations were when

compared with Local 347 at the time they merged into Local 347. In addition, if our recommendations are adopted, Local 347, like other public sector locals, will have a seat at the table in drawing up the structure of the new regional locals.

If our recommendations are adopted, all existing SEIU public sector local unions in California except Locals 99, 1000, 1983, 2579, and the new SEIU-AFSCME joint childcare local union, will be consolidated into new local unions. This consolidation will include a substantial portion of the members of Locals 347, 415, 535, 614, 616, 620, 700, 715, 790, 817, 949, 998, 1280, 1292, 1997, 2028, and 4988. We agree with Sister Davis-Howard that it is vital to preserve in permanent form the proud history, achievements, cultures and traditions of these SEIU local unions. Accordingly, we recommend that the International Union establish a suitable archive or similar facility whose purpose will be to memorialize this history for the benefit of current and future SEIU members and activists.

b. Geographic Jurisdiction

With respect to the contested questions of geographic boundaries for the new locals, we recommend as follows. Jurisdiction for San Joaquin County should be awarded to the Northern regional local union. Although that county is sometimes considered a part of the Central Valley, San Joaquin County employees are currently represented by Local 790, and to move them to the North Central local would split the public sector workers currently represented by Local 790 into two regional local unions, because the bulk of the Local 790 membership will go into the Northern local union.

Similarly, we do not think it makes sense for Kern County to be placed in the South Central local union. To do so would divide the members currently represented by Local 700 into two regional local unions, given that Kings and Tulare counties are placed in the North Central local union. Moreover, Brother Wollesen and Chuck Waide, Local 700's Supervisor of Field Services, made a convincing case that SEIU's Kern County members have much more in common with the Central Valley counties to the north than they do with the Los Angeles basin to the south. Tr. 489-91, 504-06. Besides being geographically separated from Los Angeles by the Tehachapi range, Kern County and its workers share a common culture and political orientation with Central Valley counties like Tulare and Kings.

We also do not recommend splitting up the Tri-County area identified by Walt Hamilton, Executive Director of Local 620, and Sister Davis-Howard. The Tri-County area consists of Ventura, Santa Barbara, and San Luis Obispo counties. Tr. 134, 187. Brother Hamilton testified that there is a historical tie among these counties. The central labor council covering these counties is known as the Tri-County Central Labor Council. There are also close ties between this area and Los Angeles. Los Angeles-based Local 99 has assisted Local 998, the Ventura public local, with school district bargaining. Tr. 316. Local 998's IHSS providers are being serviced by Local 434B, also headquartered in Los Angeles, and have recently voted to join that local. In addition, Local 660, another Los Angeles-based union, assisted Local 998 by training organizers and assisting with collective bargaining. Tr. 344. On the other hand, we do not perceive a strong connection between Santa Barbara and the Central Valley counties. These are some of the factors that lead us to conclude that the coastal Tri-County area is more appropriately placed in the South Central regional local.

In addition, we are convinced that the South Central regional local should have jurisdiction for Orange County. Orange County forms an essentially unbroken greater metropolitan area with much of Los Angeles County. Except for a small strip to the south, it is surrounded by jurisdictions that will be in the South Central local (Los Angeles, San Bernardino and Riverside counties). Locals 347 and 660, both based in Los Angeles, already represent workers in Orange County. Former Orange County Local 787 merged into Local 660 and became Chapter 787 of Local 660, with an office in the county. Tr. 344. By contrast, Local 2028, which is seeking jurisdiction for Orange County, does not represent workers in the county and has no offices there.

Finally, we recommend that Regional Center employees be assigned to the regional public local where the employees work. The particular statewide concerns of these employees can be the subject of an industry council uniting similar workers across regional lines.

We therefore recommend the following geographic jurisdiction for these four local government local unions, together with the recommended mergers of public sector workers in existing locals into each new regional entity, as detailed below. The names we use here for the new locals are for purposes of this report only and we are not recommending that the IEB adopt these particular designations.

Northern Regional Public Sector Local: Jurisdiction for public sector workers in the counties of Del Norte, Siskiyou, Modoc, Humboldt, Trinity, Shasta, Lassen, Mendocino, Tehama, Plumas, Glenn, Butte, Sierra, Lake, Colusa, Sutter, Yuba, Nevada, Sonoma, Napa, Yolo, Sacramento, Placer, El Dorado, Amador, Marin, Solano, San Francisco, Contra Costa, Alameda, San Joaquin, and Calaveras. We recommend the merger into this new local of the

public sector units, excluding IHSS workers, of Locals 535 (Northern workers only), 614, 616, 707, 790, 949, 1280, 1292, and 4988. In addition, public employees represented by UHW and Local 790 who work for San Francisco International Airport should be merged into the Northern regional local.

North Central Regional Public Sector Local : Jurisdiction for public sector workers in the counties of San Mateo, Santa Cruz, Santa Clara, Santislaus, Alpine, Tuolumne, Mono, Monterey, San Benito, Merced, Mariposa, Madera, Fresno, Kings, Tulare, Inyo, and Kern. We recommend the merger into this new local of the public sector units, excluding those in district hospitals, of Locals 415 (also excluding IHSS workers), 535 (North Central workers only), 700, 715 (including IHSS workers), and 817 (also excluding IHSS workers).

South Central Regional Public Sector Local: Jurisdiction for public sector workers in the counties of San Luis Obispo, Santa Barbara, Ventura, Los Angeles, San Bernardino, Riverside, and Orange. We recommend the merger into this new local of the public sector units of Locals 347, 535 (South Central workers only), 620, 660 (excluding Los Angeles Office of Education employees), 998, and 1997 (excluding district hospital workers).

Southern Regional Public Sector Local: Jurisdiction for public sector workers in the counties of San Diego and Imperial. We recommend the merger into this new local of the public sector units of Locals 535 (Southern workers only) and 2028.

Many public sector locals and members voiced their desires for a process to allow member and leader input concerning the structure of the regional locals. We agree with these concerns, and accordingly we recommend that the International President appoint a broad-based member advisory committee on the public sector reorganization. The committee should be

charged with developing a proposed structure for the regional public local unions, as well as proposed industry councils that would operate across regional lines. The committee should develop a plan for transitional continuity and governance. The committee's work should be driven by the following set of core principles:

- Regional locals should have similar structures
- Structure must facilitate growth
- Structure should dramatically increase member participation
- Structure should enable the delivery of enhanced member services
- Implementation plan should provide for new leader and staff development

We recommend that the committee's work be concluded no later than six months and that a plan be submitted to the undersigned hearing officers for review and approval prior to submission to the International President by the end of 2006.

c. Jurisdiction for Public Healthcare Workers

We further recommend that the new regional public sector local unions have jurisdiction for public healthcare employees, including public hospital workers and public nursing home workers. We are not persuaded that it makes sense to divide workers of a single employer into multiple local unions. Such a course would run counter to the principle we have adhered to in countless jurisdictional matters of uniting workers of a single employer in a single union to build power for our members and to enable us to speak with one voice. The mixed results we have had in San Francisco and Alameda County with multiple unions representing employees of a single public employer further suggests that we need to try another approach. By eliminating

fragmented local union representation of employees of the same employer, we will be able to speak with one voice on behalf of our members at these facilities.

We are not convinced that stripping out public healthcare workers from multi-department county-wide bargaining units is achievable, practicable or desirable. In fact, legal and administrative constraints on fragmentation of bargaining units could make this a risky maneuver without clear benefits to the members.

We recognize the special mission of the public health sector. We think that the public sector regional unions will be in the best position to deal with county employers on the issues facing county public health workers. Many of these issues cut across departmental lines and affect other county workers as well. We want to see a structure that permits public health care workers to fully benefit from efforts made on behalf of other county workers, and also to make their own contributions toward winning higher standards for their brothers and sisters in other departments of local government.

We are also mindful of the Herculean task the Health Systems Division has given UHW: organizing over 40,000 private sector and healthcare district employees into SEIU. Accomplishing this far-reaching goal will require tremendous resources, focus, and dedication from UHW, and falls squarely within its core jurisdiction. No other SEIU local union in California is attempting to nor has the capacity to organize private sector healthcare workers. We think that UHW needs to concentrate on this primary goal, and that our recommendation regarding jurisdiction will help it do just that.

If our recommendation is adopted, new regional public sector locals will exercise jurisdiction for public healthcare workers within their respective geographies. This includes

public healthcare workers currently represented by existing public sector local unions, and workers currently represented by UHW at San Francisco General Hospital, Alameda County Medical Center (“ACMC”) (including the public acute and psychiatric hospital and clinics and public nursing home), and the Laguna Honda Hospital public nursing home. These units should be merged into the Northern regional public local. We suggest one exception to assignment of public health members to the regional public locals. UHW represents workers at Tuolumne General Hospital. No other SEIU local union represents workers at this hospital, and there was no testimony offered concerning this facility. The Public Services Division should gather information concerning Tuolumne to evaluate whether and how it fits in with the Division’s strategic goals. For the present, these workers should remain in UHW, subject to later review.

d. Public Sector Registered Nurses

Based on the testimony given by public sector registered nurses, we think RNs demonstrated a strong identification with the special, public mission of the public health care populations with whom they work, as well as an appreciation for the work of other healthcare workers and an understanding of the significant role registered nurses can play in a unified healthcare local union. We recommend that the new regional public sector locals have jurisdiction for the public sector registered nurses, just as current public sector local unions like Local 790 have jurisdiction for public sector registered nurses. We also recognize that RNs play a critical role in leading the public health care team. Accordingly, we make specific recommendations on RN structures both within and outside the new regional local unions.

We recommend that each regional local have dedicated staff to help coordinate and lead the nurse program work within the new public locals. Each regional local should also have a designated nurse leader with responsibility for overseeing the development and implementation of the nurse program within the local. We further recommend that each regional local representing RNs have proportional representation on the steering committee/leadership group of the Nurse Alliance of California. This will enable public sector RNs to have a strong voice in matters of legislation, policy, standards and bargaining that cut across regional lines. We think such representation will promote the RN identity within the public sector regional locals, including the occupational and professional issues of public sector RNs.

To ensure that public sector RNs have a significant role in the development of statewide initiatives of interest and benefit to the profession, we also recommend that two co-chairs of the Nurse Alliance of California be created, and that one co-chair be reserved for a representative of public sector RNs, and the other for a representative of private sector RNs. Due to the high density of public sector nurses in California and the critical role that California nurses play in leading on quality, patient care issues, we also recommend strengthening the public sector RN voice at the national level by adding an additional public sector RN representative to the national Nurse Alliance leadership group.

Further, we recommend that a representative of public sector registered nurses serve on the member advisory committee referenced below, so that registered nurses will have a role in the design of the regional public sector unions that will be created if our recommendations are approved.

e. Ancillary Public Sector Jurisdiction

In addition to their core jurisdictions, public sector local unions also represent employees of private sector employers, such as bookstores, contracted national park employees, and non-public airport workers (other than contracted airport workers and security personnel), that don't fall into any of the SEIU industry divisions. Locals 535 and 790 are examples of public local unions with such members. We recommend that the regional public sector unions retain jurisdiction for these ancillary units.

6. Jurisdiction for Private Non-Profit Agency Employees

Consistent with our recommendation that the new regional public services local unions absorb the jurisdiction for public sector workers from existing public sector local unions, we also recommend that the new regional locals have jurisdiction for employees of publicly-funded private non-profit agencies. Such agencies are prevalent in the delivery of services to developmentally disabled and mental health clients. The new regional local unions should also have jurisdiction for privately-funded non-profit agencies that deliver social services, such as Planned Parenthood and the Red Cross.

7. Jurisdiction for District Hospital Employees

The evidence regarding district hospitals demonstrated that they are a true hybrid. Although district hospitals are clearly public entities, they often behave like private sector hospitals. County government does play a role in the establishment and operation of district hospitals, but that role is limited. Some healthcare districts hire a private company or chain to manage the district hospital; other district hospitals are directly managed by elected boards. And

some even have a combination of public and private governance. To make matters even less clear, several hospitals have passed from private to public governance, or vice versa. District hospital workers confront many of the same challenges as other hospital workers, but this does not further the claims of either the public sector locals or UHW, because both represent, and will continue to represent, hospital workers.

We believe that the evidence does not warrant a blanket grant of jurisdiction to either public sector locals or UHW for organizing unorganized district hospitals. Instead, we recommend that UHW and the public sector locals share jurisdiction for the unorganized district hospitals, and that a case-by-case approach govern the award of specific organizing rights, with the right to organize a particular district hospital determined by division strategic growth goals in the area. We further recommend that proposals to organize particular district hospitals be submitted to the directors of both the Public Services Division and the Health Systems Division for approval. Any disagreement between the divisions regarding a grant of organizing rights with respect to a district hospital should be resolved by the International President.

Division strategic organizing imperatives are less significant with respect to El Camino district hospital in Santa Clara County and Hazel Hawkins district hospital in San Benito County, both district hospitals that have already been organized. While the case is a close one, we recommend that, on balance, the private-sector behavior of these two district hospitals argues for UHW to represent the members at El Camino and Hazel Hawkins, and that merger with UHW would strengthen the hand of these workers given their particular circumstances. As discussed above, workers at Alameda County Medical Center should be merged into the Northern regional public local.

8. Jurisdiction for School Employees

We agree with Local 99 and Local 535 that Local 99 is large enough to be a self-sustaining local union focused on the education sector. In addition, we recommend that Local 99 be granted jurisdiction for all education employees in the same geographic area covered by the recommended South Central regional public sector local, namely, Los Angeles, Ventura, Santa Barbara, San Luis Obispo, San Bernardino, Riverside, and Orange counties.¹²

We think that the particular statutes and policies governing education in California make a separate schools local feasible in Southern California. By “education employees,” we mean Head Start, K-12, county office of education, and community college employees. With one exception (noted below), all such employees represented by current public sector local unions in the counties listed above should be merged into Local 99 as soon as feasible. These include employees of the Santa Monica school district and the Los Angeles County Office of Education currently represented by Local 660, Pleasant Valley School District workers in Local 998, and Ventura Community College members represented by Local 535. Due to legal restrictions on school employees and supervisors being in the same certified union, jurisdiction for LAUSD school supervisors represented by Local 347 should be transferred to the new South Central regional public local.

¹² In his post-hearing submission, Brother Lloyd requested jurisdiction for Kern County education employees. However, if our recommendations are adopted by the IEB, the South Central public local will not have jurisdiction for Kern County. Accordingly, Local 99 should not have jurisdiction for Kern County school employees. Rather, these employees should be in the jurisdiction of the North Central regional local.

**9. Jurisdiction for Employees of the State of California
and the California State University System**

In contrast to the multiplicity of local unions representing local government workers, only one SEIU local union, Local 1000, represents employees of the State of California. Accordingly, we have no occasion at this time to recommend any changes. We note that Local 1000 needs to adhere to the 20% organizing budget mandate set forth in the SEIU Constitution and Bylaws. In this connection, Local 1000 should submit an organizing plan to the Public Services Division for approval.

Local 1000 is an affiliate of the California State Employees Association (“CSEA”) along with Local 2579, which represents classifications of non-faculty employees of the CSU system. The CSU system is governed by an independent Board of Trustees. Tr. 1119. At the hearing on CSU jurisdiction, Local 2579 President Pat Gantt requested jurisdiction for private sector employees of CSU foundations. Tr. 1115. Brother Gantt testified that there are nearly 35,000 employees working for 80 foundations throughout the CSU system. Half of the foundations are student-run, and those account for 7,500 employees. Fifteen hundred employees are performing work substantially similar to bargaining unit work being performed by CSU employees. Yet, only 70 foundation employees are currently represented.

We agree that it makes sense for Local 2579 to have jurisdiction for the CSU foundation employees, except for jurisdiction already granted to SWU, provided that Local 2579 develops and submits to the Public Services Division for approval a detailed plan for implementing the 20% organizing budget requirement. This plan should be submitted jointly by Local 2579 and

California Faculty Associates, Local 1983, the SEIU local union that represents CSU teaching faculty.

Both Local 1983 and Local 2579 represent CSU employees across the state. Some of the CSU campuses are far from urban centers. Accordingly, we recommend that these two CSU locals intensify their coordination and cooperation to the maximum extent possible. We recommend that, wherever possible, Locals 1983 and 2579 coordinate bargaining and share office space and staff. Ultimately, we think that these two locals, representing employees of the same employer, should voluntarily discuss maximizing coordination.

B. Jurisdiction for Long-Term Care Workers

1. Proposals for Long-Term Care Reorganization

a. The Statewide Model

According to the testimony of Brothers Kieffer and Barton on behalf of the Long-Term Care Division, local elected leaders in the Division from across the country have concluded that long-term care is a distinct industry within healthcare uniquely dependent on state Medicaid programs for funding. Tr. 1121-36, 1979-91. Therefore, the Division believes that the most logical geographical model for organizing and collective bargaining strength in the Long-Term Care Division is a single statewide local union for long-term care workers in each state.

Brothers Kieffer and Barton stressed that it is important to concentrate members' political power at the state level because the state Medicaid program is the most important funding stream for long-term care workers. They added that uniting all employees of statewide and national nursing home chains and homecare entities is best done in a single statewide local union. The

Division representatives emphasized that large scale organizing and bargaining campaigns require large scale resources, and that overcoming wage and benefits variations within a state is best accomplished by unified statewide approaches.

Brothers Kieffer and Barton explained that, in California, there are 90,000 unorganized nursing home workers, 70,000 unorganized home health care workers, and 46,000 unorganized employees of assisted living facilities and comprehensive care campuses. Uniting these 206,000 long-term care workers into SEIU will require focus, concentration, resources, and speaking with one voice.

The Division presentation highlighted SEIU's organizing successes among long-term care workers. Over the last decade, long-term care representation in California grew from less than 10,000 members to almost 240,000.¹³ Of these, Local 434B organized at least 107,000 and UHW organized at least 43,000. In 2005, SEIU organized 18,710 new long-term care workers in California. Local 434B organized 18,494 of those new members, and UHW organized 292. In 2005, Local 434B and the Division devoted considerable resources to achieve that result. Future organizing is tied to the private sector in nursing homes, homecare agencies and senior housing – sectors that are still subject to state politics.

Brothers Kieffer and Barton pointed out that the nursing home industry is a national and statewide industry. There are 1185 nursing homes in California. Twenty-two firms control 450 facilities and most operate in both Northern and Southern California. Multi-facility operators run 90% of the state's nursing home facilities. Many of the largest California operators are also the

13 This corrected figure was supplied in a post-hearing submission from the Division.

largest national companies that bargain with other SEIU locals in other states. SEIU bargains with most statewide operators at a statewide table.

The Division believes that nursing home membership growth requires a statewide strategy. SEIU is engaging in joint political work with a majority of the large chains to help the industry win more funding to enable raising standards for industry workers. Through such statewide efforts we have won organizing rights at 120 facilities, with 50 organized to date. Our work on accountability campaigns is statewide in scope. And Medi-Cal, the California Medicaid program, pays nursing home fees for 65% of all nursing homes residents.

In homecare, county-based strategies were initially important in organizing the industry and setting standards. However, today, county-based strategies are less important in organizing and contract bargaining, based on three factors: 1) Medicaid funding decisions are made in Sacramento, 2) IHSS public authorities are now mandated, and 3) all IHSS workers are organized. Between 1999 and 2004, our political successes in Sacramento have reduced the county share of IHSS funding from 66% to 17.5%, and increased the state share from 0 to 32.5%.

The Division explained that a county-based strategy will not address IHSS wage disparity across the state. The highest paid IHSS workers earn \$3.75 an hour more than the lowest paid IHSS workers for doing exactly the same work. Wage variations for nursing home CNAs is \$5.83 per hour. Yet Medicaid is the biggest funder for IHSS workers and nursing home workers, and is controlled in Sacramento. And wage standards for IHSS workers cannot be explained by the alignment of county bargaining. Whether or not the same local union represents IHSS providers and county employees, wage rates are determined by the poverty rate and local labor rates.

Brothers Kieffer and Barton asserted that the collective political strength of the union statewide is what is most important in addressing current and future challenges in homecare and nursing homes. These two facets of the industry are inextricably linked, according to the Division. They are part of the continuum of long-term care and share the same Medicaid funding source which is controlled at the state and federal levels. Brothers Kieffer and Barton asserted that battles for future growth in the industry must be fought at the state level, including defending the Medicaid program from repeated assaults by politicians, influencing state contracts with managed care organizations that contract with long-term care providers, and using our political strength to increase the pace of organizing in nursing homes and senior housing. According to the Division, for a local union to efficiently and effectively manage statewide issues and strategies, long-term care members should be its sole priority, providing a single voice representing long-term care members across the state.

Local 434B supports the concept of a single local union with jurisdiction for all long-term care workers in California. Tr. 1344-94, 2102-27. Local 434B President Tyrone Freeman testified that Local 434B understands the particular needs and concerns of long-term care workers because it represents only long-term care workers in California. Brother Freeman stressed that Local 434B is already a statewide union, representing nearly 180,000 long-term care workers in every geographic area of the state. Brother Freeman agreed with the Division testimony that a statewide strategy will be necessary as we move to address the needs of long-term care workers at the bargaining table and in Sacramento. He cited a 2002 court ruling that IHSS "is a comprehensive program, comprehensively regulated by the state." He pointed out that SEIU local leaders representing homecare workers have endorsed a united strategy by signing the

California Homecare Council agreement providing for a unified approach to bargaining standards and legislative initiatives. Brother Freeman chairs the Council. He also detailed the many programs offered by Local 434B designed solely for long-term care workers, such as a scholarship program, a housing corporation, and various training programs.

In post-hearing submissions, Sister Jefferson, on behalf of Local 616, supported the statewide model advanced by the Long-Term Care Division and the Division's rationale for that model. Sister Jefferson concluded that only Local 434B, as the SEIU local union with the largest long-term care membership and a statewide presence, is in a position to carry out the statewide model. Local 616 stated that, in the event immediate consolidation of all long-term care members into Local 434B is not feasible, those IHSS workers in public sector local unions should be consolidated with Local 434B now, and UHW's long-term care units should be merged after a transition period. UHW and Locals 707, 817, 715, and 1280 opposed a statewide model that would unite all long-term care workers in Local 434B.

b. The North/South Model

On behalf of UHW, Brother Rosselli stated that, in principle, a single local union representing all healthcare workers, including long-term care employees, was the preferred model. Brother Rosselli argued that long-term care workers are healthcare workers, and therefore all California long-term care workers should be united in UHW. However, acknowledging the complexity of the issue, Brother Rosselli proposed that UHW be granted jurisdiction for all IHSS workers and nursing home workers in Northern California, and that Local 434B be granted jurisdiction for these workers in Southern California. Tr. 1256-64. UHW

further proposed that it be granted jurisdiction for all private sector homecare workers in the state.

In proposing a partnership between UHW and Local 434B, Brother Rosselli emphasized the successes realized by both local unions on behalf of long-term care workers. Brother Rosselli stressed that Local 434B and UHW were already working together in the nursing home sector with coordinated bargaining, political work, and organizing support, and in the homecare sector in the California Homecare Council and the California United Homecare Workers Union. He pointed out that, together, UHW and Local 434B have organized and represent the vast majority of unionized long-term care workers in California. Brother Rosselli further asserted that UHW and Local 434B have the resources, depth of industry knowledge and vision necessary to address the challenges of the future. He detailed UHW's plans to organize private sector home health workers, nursing home workers, and employees of senior living facilities. In a post-hearing submission, Brother Rosselli presented additional materials and arguments in favor of a UHW-434B partnership in the representation of convalescent workers. The North/South model was also endorsed by Local 817. Tr. 1184-85, 1195. Local 616 opposed the North/South model

c. The Public Sector Model

Several public sector locals advanced the proposition that all jurisdiction for homecare workers should be granted to the new public sector locals. Under this scenario, homecare workers represented by UHW and Local 434B would be assigned to the new regional locals, as would homecare workers currently represented by existing public sector locals. In addition, the regional public sector locals would have responsibility to organize the private sector non-hospital

owned homecare agencies. Ex. 34. In support of this approach, Sister Sermersheim, on behalf of Local 715, testified that counties continue to play an important role in the determination of wages and benefits for homecare workers. Tr. 1208-31. She argued that the county is the employer of record for both traditional county employees and IHSS workers. She maintained that counties contribute to the funding of IHSS programs, and that the county must pay 50% of the cost of raising IHSS workers' wages beyond \$10.50 per hour and healthcare benefits higher than \$.60 per hour, whereas the state pays zero. Sister Sermersheim pointed to the important gains made by public locals on behalf of homecare workers. She added that county unions have the political clout at the county level to increase standards for IHSS workers. Local 715 Vice President Christine Walters requested that, if the Local 715 IHSS workers could not stay in a public sector local, they preferred to merge with UHW. Tr. 1250.

Local 1280 Executive Director Art Grubel supported the public sector model in additional comments filed following the hearings. Brother Grubel stressed that, until the state takes over administration of the IHSS program, a county-by-county approach will yield more results for our IHSS members. He stated that, based on political obstacles to achieving state administration through legislation or the initiative process, and expected opposition from advocates for the elderly and the disabled, state administration of the homecare program is unlikely to be achieved anytime soon. Locals 415 and 707 also support the public sector model. Tr. 1204-08, 1325-32, 1343.

As an alternative, Brother Grubel identified what he termed a "modified status quo" approach. Under this concept, UHW and Local 434B would continue to represent homecare workers in the counties where they already have jurisdiction. The new regional public sector

locals would absorb homecare jurisdictions from the existing public sector unions currently representing homecare workers in each region. UHW and Locals 434B, 616 and 817 oppose the public sector union option.

2. Recommendations for Long-Term Care Workers

There is no doubt that the long-term care sector is a distinct industry. Institutionally, SEIU has recognized the unique attributes and requirements of this industry and its workers through the establishment of a Long-Term Care Division, separate from the Health Systems Division, which encompasses acute care and related facilities. The record persuasively demonstrates that the long-term care industry is characterized by state and national employers and that a statewide strategy is imperative if we are to effectively deal with the key industry players on behalf of current and future members. The record also establishes beyond dispute that all facets of the industry – homecare, skilled nursing care, and senior living – are linked as part of the continuum of supportive services for the infirm, with related workplace issues, employee skill sets, payer mixes and clients who go from one setting to another. We are convinced that, to raise standards for long-term care workers, a unified approach on the statewide level is the optimum choice. No other option has the prospect of successfully addressing the current county-by-county disparities that exists among California homecare workers. Along with the Division, Local 434B, the SEIU local union with the largest contingent of long-term care workers, agrees that uniting long-term care workers in one union makes the most sense. The North/South approach not only violates this concept; but, by the logic of UHW's single healthcare union model, the entire Southern California hospital membership of UHW would need to be moved to Local

434B. This would essentially undo the consolidation of Locals 399 and 250 that was just completed in 2005.

The county-based model of homecare work made sense when we were organizing the IHSS public authorities, and when county funding for IHSS providers was paramount. Now that all California IHSS workers are in unions, and state funding has become dominant, the county-by-county approach no longer meets the needs of our homecare membership.

SEIU locals have already taken steps in the direction of unifying our approach to the organization and representation of California long-term care workers. For example, as members of the Joint Organizing Partnership, Locals 707, 614, 1280 and 616 already pool their resources. In addition, through the California Homecare Council, local unions representing homecare workers coordinate bargaining strategies, uphold standards, determine policy goals, attempt to speak with one voice to coalition partners, and jointly plan legislative strategies. However, we need to go much further in unifying our efforts if we hope to realize our goals of organizing and lifting up all California long-term workers.

Accordingly, we think that, ideally, uniting long-term care workers in one union makes the most sense. We also believe that, to really win for long-term care workers, that local union should focus solely on the particular needs of those workers.

In proposing a structure for representation of long-term care workers, we are mindful of the principles enunciated by Sister Davis-Howard concerning the benefits of beginning anew with newly-chartered unions that can organize themselves along the most effective lines, irrespective of the old bureaucratic structures of our existing unions. Sister Davis-Howard's request that we recommend the creation of new local unions, rather than the merger of SEIU-

represented units into existing local unions, focused on the question of how we can best reorganize our public sector jurisdictions in California. However, we find her concerns equally applicable to the long-term care setting. We therefore recommend that a new local union be chartered to focus solely on our long-term care members.

We turn now to the question of the precise plan of consolidation for this new local union. Our recommendations are as follows: First, homecare workers currently represented by Local 434B and our existing public sector unions should be merged into the new long-term care local, with one exception.

The exception we recommend concerns the North Central regional local union. That proposed local has a large geography stretching from San Mateo, Santa Cruz and Monterey counties in the west to Mono and Inyo counties in the east, and from Stanislaus and Tuolumne counties in the north to Kern County in the south. The placement of all IHSS workers in this geography in a long-term care local would leave this local with the smallest membership base by far among the three regional locals with significant geographical sweep: according to the estimates of the International Union, the North Central regional local would have under 35,000 workers, compared with over 51,000 in the Northern region and 91,000 in the South Central region. The Southern region would have less than the North Central region, but the Southern region has a compact geography encompassing just two counties: San Diego and Imperial. We are concerned that, given the extensive territory to be covered and the increased number of collective bargaining agreements to be negotiated by the North Central local, the projected membership without homecare workers may not be sufficient to assure growth and representation at the levels we expect.

Accordingly, we recommend that, for the present, the IHSS workers currently in Local 715 be placed in the North Central regional local union, which would bring the anticipated membership in that local up to about 45,000. Based on these recommendations, the IHSS units in Locals 415, 434B, 614, 616, 707, 817, and 1280 should be merged into the new long-term care local union.

Second, the private nursing home units represented by Locals 434B and 2028 should be consolidated with this new long-term care local. Third, all private sector homecare workers represented by Local 434B should change their affiliation to the new long-term care local union. Fourth, Local 415's unit of Sunshine Villa workers should be merged into the new local. If this recommendation is adopted, we will have two local unions representing nursing home workers in the state: the new long-term care local union and UHW.

We further recommend that, for the present, UHW continue to represent its current private sector homecare workers, IHSS workers and nursing home workers. This recommendation is based on the large number of nursing home and IHSS workers currently represented by UHW and the difficulties that would be posed by removing these members from UHW.

If this recommendation is adopted, we will have three local unions representing homecare workers in the state: the North Central regional public local, the new long-term care local, and UHW. We recognize that this determination may not be the optimum solution in the long run. While three locals representing homecare workers is an improvement over the current fragmented structure, by its very nature this structure is not as compatible with the notion of speaking with one voice as a single long-term care local union would be. For this arrangement to

work well, the locals should closely coordinate their homecare activities within the California Homecare Council. The Long-Term Care Division should propose to the International President any changes in the structure of the Council which the Division deems advisable in light of the changed makeup of the Council resulting from our recommendations.

Our recommendation with regard to representation of private nursing home workers will, if adopted, result in two unions representing SEIU nursing home members: the new long-term care local and UHW. As with the recommended homecare representation model, this split representation approach is less conducive to speaking with one voice than would be the case with a unified structure. To address these concerns, we recommend that the Long-Term Care Division determine the appropriate vehicle to foster coordination and growth. One possible approach could be the creation of a unity council for private sector nursing home workers. Article VIII, Section 1(f) of the SEIU Constitution and Bylaws, adopted at the 2004 Convention, empowers the International President to require coordinated bargaining and contains new language authorizing industry divisions to propose to the International President structures, procedures and financing for coordinated bargaining.

The homecare council and any structure developed for coordination of our efforts on behalf of nursing home workers should take the lead in advancing coordinated bargaining, legislative, and political goals for SEIU's California long-term care members. We recommend that the locals with nursing home and long-term members be part of the appropriate council or other body and be required to abide by decisions and participate in programs of these vehicles of coordination.

Rather than recommending a grant of exclusive jurisdiction to the new long-term care local, UHW, or the North Central public sector local, we propose that authorization to organize long-term care facilities be determined by the Division, subject to approval by the International President. These determinations should be based on the locals' organizing strategies and the ability to win higher standards for our long-term care members in a given location. We recommend that, pending issuance of the Division's organizing plan for California long-term care workers, local unions be required to submit specific organizing proposals to the Division for approval, and that all organizing proceed in the name of the International Union.

We further recommend that the effectiveness of this reorganization be evaluated by the Division in the future to determine what changes may be warranted. The Division's analysis should focus on the success of the existing model in 1) helping to raise standards for homecare workers 2) helping to organize the long-term care industry, broadly defined, and 3) permitting UHW and the North Central regional public local to organize their core jurisdictions of private sector healthcare workers and public sector workers, respectively.

Consistent with our recommendations for public sector jurisdiction, we recommend a process for development of the structure of the new long-term care local. Accordingly, we recommend that the International President appoint a member advisory committee on long-term care reorganization. The committee should be charged with developing a proposed structure for the new long-term care local. The committee should develop a plan for transitional continuity and governance. The committee's work should be driven by the following set of core principles:

- Structure must facilitate growth
- Structure should dramatically increase member participation

- Structure should enable the delivery of enhanced member services
- Implementation plan should provide for new leader and staff development

We recommend that the committee's work be concluded no later than six months and that a plan be submitted to the undersigned hearing officers for review and approval prior to submission to the International President by the end of 2006.

C. Jurisdiction for Private Hospital Workers Represented by Public Locals

Local 4988's private hospital units are in chains whose employees elsewhere in the state are represented by UHW. UHW plainly has the expertise, leverage and chain-wide strategies to win for these workers. Local 4988 requested that its relationship with Local 790 remain unchanged. However, if our recommendations are approved, Local 790 will be merged into a new regional local union. Accordingly, we recommend that Local 4988's private sector healthcare units merge into UHW. In addition, the affiliation of private healthcare units represented by Locals 707, 715, and 2028 should be changed to UHW as soon as feasible.

Local 121RN, which represents about 7000 private sector nurses and professionals in Southern California, seeks jurisdiction for Kaiser nurses and professionals in Southern California currently represented by Local 535. Tr. 1992-96. However, not all of Local 535's Kaiser units are in Southern California, and one is a unit of technical employees. We therefore recommend that Local 535's Kaiser units be merged into UHW as soon as feasible. UHW already represents SEIU members in the Kaiser system and is the principal SEIU local union in the Kaiser bargaining council. As such, it is the logical local union to exercise jurisdiction for these Kaiser employees.

D. Jurisdiction for Property Services Division Members

On behalf of the Property Services Division, Brother Iny described the trend across SEIU toward consolidation of smaller local unions into larger unions focused solely on property services members. In New York City, Locals 32E, 531, 54 and 2 merged into Local 32BJ in March 2001. In 2005, Local 36 (Philadelphia) merged into Local 32BJ. And in 2006, Local 82 (Washington, D.C.) united with Local 32BJ. Working together in New York City has recently led to displaced worker protection, card check and neutrality for Brooklyn waterfront redevelopment, coordinated bargaining and the maintenance of fully paid health insurance for New York City members, and growing the union by 4,000 including suburban markets like New Jersey. In Chicago, Locals 25, 73 and 236 merged into Local 1 in 1999. In 2002, Local 1 merged with Local 50 (St. Louis), Local 96 (Kansas City), and the property services part of Local 150 (Wisconsin). Working together in Chicago has recently led to health insurance for suburban and contracted public sector security, and organization and increased standards for suburban contracted school janitors, helping to raise standards for public sector cleaners. In addition, property services members in Local 79 (Detroit), Locals 508 and 585 (Pennsylvania), and Locals 47 and 85 (Cleveland) have united in Local 3, a tri-state property services local.

Mike Garcia, President of Local 1877, testified that we are not at the point yet in California of being able to unite all property services workers in a single local union. Instead, as the next step toward uniting California property services workers, Brother Garcia and the Division proposed the creation of a California Property Services Council to bring together all California property services local unions to facilitate coordinated bargaining, help plan and implement strategic organizing campaigns, and enhance communications among local unions

representing similar employees. Local 265 supported this proposal. We agree that a California Property Services Council makes sense, and recommend that, pursuant the Division's recommendation and the International President's authority under Article VIII, Section 1(f) of the SEIU Constitution and Bylaws, such a Council be created with sufficient resources to carry out these objectives. The Council should be organized along industry sector lines so that the concerns and needs of the different occupational and employer-based groups within the Property Services Division can be addressed by leaders and members in those groups.

We recommend that the International President adopt the following plan recommended by the Division. Within six months of the IEB's decision in this matter, the locals, together with property services units from other locals, should confer and agree to a structure and plan of action for the Council. This plan should be submitted to the undersigned hearing officers by the end of 2006 for approval and submission to the International President. We recommend that Locals 1877, 24/7, 265, 280, the Los Angeles security local, and the private university group be required to participate in the Council.

As noted above, Local 2028 has an amusement division that includes stadium and arena employees, theater and convention center workers. These workers should be in a Property Services Division local union. Accordingly, we recommend that these units be consolidated with Local 1877 as soon as feasible.

In the higher education sector, the Property Services Division has members (in-house and contracted) at dozens of colleges and universities around the country. Examples are Harvard, USC, Stanford, New York University, and the University of Chicago. In California, Local 1877

also represents workers at the University of San Francisco, UC Davis, UC Berkeley, UC Irvine, Cal State Sacramento, and San Jose State.

At the hearings and in post-hearing submissions, the United Stanford Workers chapter of Local 715 proposed two alternative jurisdictional arrangements for workers at Stanford and Santa Clara universities. First, the chapter proposed that a charter be issued to a new local union covering those two universities with jurisdiction to organize university workers throughout the state. In the alternative, the chapter suggested that the Stanford workers be united with UHW, which is servicing the Stanford and Lucile Packard Hospitals and which, if this report is approved by the IEB, will soon be granted jurisdiction for the employees of those facilities. The chapter's requests were based in part on the feeling of those testifying that university workers were not part of the core jurisdiction of SEIU and did not fit neatly into any of the division-based local unions.

Although there have been unification discussions between representatives of the Stanford chapter and Local 1877, it appears to us that an interim step toward eventual merger should be the chartering of a new local union with jurisdiction for workers employed by Stanford and Santa Clara universities. We recommend that this new local be required to participate in the Property Services Council and the development of its structure and plans, and to abide by the Council's requirements. The Council should create a higher education division that will focus resources on organizing and winning higher standards for higher education workers.

With respect to SEIU's racetrack members, testimony from Local 280 President Richard Castro made it clear that SEIU and UNITE-HERE are currently in discussions to unite SEIU's racetrack members with the gaming industry workers represented by UNITE-HERE. We agree

that UNITE-HERE is the logical place for SEIU's racetrack members. Until these discussions are completed and the racetrack members change their affiliation to UNITE-HERE, we recommend that they be housed in their current local unions (Locals 2028, 1877 and 280), participate in the Property Services Council, and abide by the Council's requirements. In the event that the change in affiliation to UNITE-HERE takes longer than anticipated, Local 2028's racetrack workers should be merged into Local 1877.

We recommend that Local 1877 have jurisdiction for subcontracted San Francisco International Airport ("SFO") employees and such workers represented by other locals should be merged into Local 1877. Any remaining employees located at SFO, whether employed by the airport directly or by ancillary employers located there, should be assigned to the Northern public local.

California cemetery workers in SEIU are spread among five local unions. Cemetery workers form a recognized occupational group within the Property Services Division. The current fragmentation of cemetery worker representation is antithetical to the New Strength Unity approach of uniting workers with similar jobs in single union. Consolidating the power of cemetery workers will give us the opportunity to organize the many non-union cemetery and country club operations identified by Local 265 in its extensive post-hearing submission.

The first step toward uniting cemetery workers will be to reduce the number of locals representing workers in the field. Accordingly, we recommend that all private sector cemetery workers in Locals 1877, 535 and 715 be merged into Local 265, which represents cemetery and country club workers exclusively. Local 265 should also be granted jurisdiction for unorganized private sector cemetery workers and green attendants. Jurisdiction for public sector cemetery

workers currently represented by Locals 700 and 715 should be awarded to the North Central regional public local.¹⁴ Local 265 should participate in the Property Services Division Council and abide by its requirements.

E. Jurisdiction for Multiservice Workers

Local 715 represents approximately 200 employees of Bon Appetit/Compass, a food service company, in two bargaining units at Stanford and Santa Clara universities. We recommend that Service Workers United, a union of multiservice workers jointly affiliated with SEIU and UNITE-HERE, have jurisdiction for these workers. Our recommendation is consistent with the testimony of Sister Sermersheim.

VII. Further Recommendations and Implementation

We believe we should reorganize ourselves to enable SEIU in California to grow, to exercise enhanced political and bargaining power, and thereby win higher standards for our members. Accordingly, we further recommend that the jurisdictions of our California local unions be reviewed in the near future. The yardstick for measuring the success of the jurisdictional models we are recommending today should be growth and higher standards. As part of this review, locals should be held accountable for fulfilling SEIU's organizing mandate. In this connection, we think that the International President should immediately appoint a

¹⁴ Local 700 represents workers at two district cemeteries in Bakersfield, whose employees are considered public employees; Local 715 represents employees at one public sector and one private sector cemetery.

California area-wide public sector organizing director, with responsibilities across local union lines, to work with our California public locals on their growth strategies during the implementation of the IEB's decision. The organizing director should also work with the other division locals and the International organizing leadership to best coordinate all division growth plans in California.

If our recommendations are adopted, we will have created powerful local unions able to focus significant resources on organizing, bargaining, and politics. Existing structures within which much of our California political work is currently done will need to be re-examined. That re-examination should take place immediately following the submission of the public sector, property services, and long-term care structure and implementation plans, with a view to instituting a new political program structure in California as soon as possible after the submission of the plans. Accordingly, we further recommend that, nine months from the date of the IEB's decision in this matter, the charter of the California State Council be revoked and a new State Council constitution be developed and approved by the new array of locals and the International Union. Then, the State Council should be re-chartered.

We recognize, and we ask the California leaders of our local unions to recognize, that establishing this or any jurisdictional framework is simply a first step toward energizing our organizing programs, changing workers' lives, strengthening our political action, enhancing member mobilization, and generally unleashing the power of SEIU, its members, and coalition partners. For our work in California to succeed the way we want it to, local leaders in the state must step up to the plate and come to agreement on a common agenda. We hope that, by leaving

behind the local structures and jurisdictions of the past, California's SEIU leaders will have a clear path to forging common ground, unencumbered by past disagreements.

We also agree with the many statements made during the hearings that the reorganization should include a process for membership voting. We recommend that a vote take place on proposed changes in members' affiliation. Although a membership vote on jurisdictional changes is not required by the SEIU Constitution and Bylaws, which vests the International Executive Board with the authority to determine jurisdiction, we think a vote on member movement into new local unions would be appropriate. We recommend that such a vote take place after the IEB's decision in this matter. We further recommend that the International Union implement a program of education and outreach to members concerning all facets of the reorganization plan. This program should allow members the opportunity to learn about the reorganization plan, make comments, ask questions, and register concerns.

We recommend that the International President issue a timetable and rules governing the vote at the appropriate time. Those rules should deal with the voting method, eligibility issues, approval requirements, and related matters. While we think it would be inappropriate for the hearing officers to attempt to settle all of those details in this report, we do recommend that, based on the comprehensive scope of the reorganization we propose today, a pooled vote among affected members is needed of locals. By "affected members," we mean members whose local union affiliation will change if our recommendations are adopted. We have attached a list of membership groups by local eligible to vote under this proposal. A piecemeal approach, either unit by unit or local by local, would be incompatible with our interrelated jurisdictional recommendations. For example, with respect to the proposed regional locals, the approval or

disapproval by a single local or series of units could alter the relative balance among the locals that we seek to achieve with these recommendations. Similarly, inconsistent outcomes among locals could leave members outside of all existing or proposed local unions.

In addition, we recommend two additional voting processes for members who change their affiliation to newly-chartered locals. We believe these members should vote on any new permanent constitutions and bylaws for their locals that may be developed and proposed. Members should also vote on regular officers of new locals once the provisional periods for these locals have concluded. The International President should determine the appropriate schedule for such votes.

As we noted above, our phenomenal growth over the past decade has been no accident. Rather, we think it is in part the result of the decisions made by SEIU Conventions to reorganize our union to maximize opportunities for growth and raising standards for members. Our Policy on Jurisdiction was approved by the 2000 Convention to guide that reorganization, and has been implemented in a number of reorganizations across the nation. Our recommendations today flow directly from that Policy. We believe that our recommendations are the right approach for our members and for SEIU in California. It is vital that our California local unions fully cooperate in the implementation of any IEB decision on California jurisdiction. Accordingly, we recommend that, in implementing the IEB's decision in this matter, the International President be guided by policies adopted for implementing previous IEB decisions concerning local union jurisdiction.

We further recommend that the Secretary-Treasurer or her designee oversee the implementation of the IEB's decision in this matter. Finally, we recommend that the undersigned hearing officers retain jurisdiction in these proceedings to resolve disputes arising from this

report and recommendations, to review and approve structures and plans presented by the member advisory committees for the new regional public locals, the new statewide long-term care local, and the property services council, and to review the California jurisdictional arrangements in the near future.

IX. Summary and Conclusion

In the public sector, we recommend the chartering of four new public sector local unions with jurisdiction for public services members in the state on a geographic basis. Existing public sector local unions should be merged into the new locals, based on geography, as detailed herein. The International Union should create an archive to preserve the history and achievements of our current California public sector locals. A broad-based member advisory committee should be established to propose a structure for the new local unions and a plan for continuity during the transition. The member advisory committee proposals should be submitted to the hearing officers for approval and submission to the International President by December 31, 2006. The new regional public locals should have jurisdiction for public sector healthcare workers. Public healthcare units currently represented by UHW should be merged into the appropriate regional public sector local, except for UHW's unit at Tuolumne General Hospital. The regional public locals should also assume the jurisdiction for private non-profit agencies, and for ancillary units that the current public sector units already represent.

The regional public sector locals should also have jurisdiction for public sector RNs. Each regional local should have dedicated staff for the RN program and proportional representation on the steering committee of the Nurse Alliance of California. In addition, public

and private sector RN co-chair positions should be created to head the Nurse Alliance of California. Further, a public RN representative position should be added in the national Nurse Alliance leadership group. Public RNs should have representation on the membership advisory committee for the public sector locals.

Jurisdiction for unorganized district hospitals should be shared by the new regional public sector locals and UHW. Authority to organize a specific facility should be granted based on the importance of the hospital to the division's strategic organizing plan. Organized units at El Camino and Hazel Hawkins district hospitals should be merged into UHW.

Local 99 should be awarded jurisdiction for all school employees in the same geographical area as that assigned to South Central regional local union. School employee units in existing public sector locals in this territory should be merged into Local 99. Jurisdiction for LAUSD school supervisors should be granted to the South Central regional public sector local.

A new statewide long-term care local union should be chartered. Local 434B and IHSS units in Locals 415, 614, 616, 707, 817, and 1280 should be merged into this new local. IHSS workers currently represented by Local 715 should be assigned to the North Central regional public local. UHW should retain the IHSS workers it currently represents.

The private nursing home unit represented by Local 2028 should be merged into the new long-term care local. UHW should retain the private sector homecare workers and private sector nursing home workers it currently represents. The Long-Term Care Division should recommend the appropriate vehicle for achieving coordination and growth in the private nursing home sector. The Division should grant authority to organize long-term care facilities based on local union strategic objectives and opportunities to raise standards for long-term care workers. In the future,

the Division should review the current long-term care representational arrangements and propose changes if warranted. A broad-based member advisory committee should be established. The committee's report should be submitted to the hearing officers by December 31, 2006.

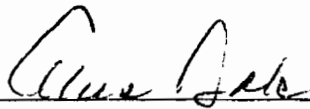
Private sector hospital units currently represented by Locals 535, 707, 715, and 2028 should be merged into UHW.

The International President should adopt the recommendation of the Property Services Division to create a California Property Services Council, and a member advisory committee should make a proposal to the hearing officers on the Council's structure and activities by December 31, 2006. Local 2028's amusement division should be merged into Local 1877. A new local union should be granted jurisdiction for the private university units at Stanford and Santa Clara universities. This new local should be required to participate in the Property Services Council and abide by its decisions. A higher education division should be created within the Council to promote the interests of our higher education members. Racetrack workers should continue to be housed in their current local unions until arrangements for their change of affiliation to UNITE-HERE can be completed. Private sector cemetery workers should be merged into Local 265, which should be granted jurisdiction for all such workers and greens attendants in California. Jurisdiction for public sector cemetery workers should be awarded to the North Central public local. Local 715's unit of multiservice workers should be merged into Service Workers United.

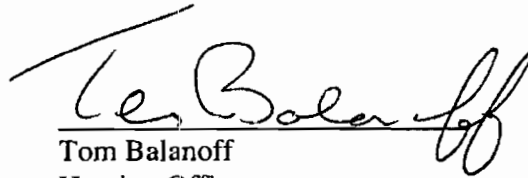
California public sector jurisdiction should be reviewed in the near future based on growth and standards. The charter of the California State Council should be revoked within nine months of the date of the IEB's decision so that a new structure based on the reorganized local

union jurisdictions can be established and a new charter issued. A pooled vote of affected members should take place regarding members' changes of local union affiliations, pursuant to a timetable and rules issued by the International President. The hearing officers should retain jurisdiction to resolve disputes and review and approve structures and plans proposed by member advisory committees. A statewide public sector organizing director position should be established during the transitional period. Finally, the Secretary-Treasurer or her designee should oversee implementation of the IEB's decision.

Respectfully submitted,



Alice Dale
Hearing Officer



Tom Balanoff
Hearing Officer

Dated: June 9, 2006

VOTER ELIGIBILITY

CALIFORNIA MEMBERSHIP AFFILIATION CHANGES

Members in units whose local union affiliation will change pursuant to the IEB decision may vote.

ELIGIBLE:

- All members of Locals 347, 415, 434B, 535, 614, 616, 620, 660, 700, 707, 715, 790, 817, 949, 998, 1280, 1292, 1997, 2028, and 4988
- All public hospital members and other public sector members of UHW, except UHW members at Tuolumne General Hospital
- All cemetery worker members of Local 1877

EXHIBIT U



ORDER OF REORGANIZATION

**TO: All Officers and Members of Locals 265, 521, 715, 2007,
SWU, and UHW, California, Service Employees
International Union, CtW, CLC**

By virtue of the authority contained in the Constitution and Bylaws of the Service Employees International Union, and consistent with the June 2006 International Executive Board decision on California local union jurisdiction and the vote of the members, I direct that all workers represented by SEIU Local 715 (except for Santa Clara University and Stanford University workers, El Camino Hospital and Stanford/Lucille Packard Hospital workers, Bon Appetit/Compass workers, and Santa Clara Mission Cemetery workers), be and are hereby, reorganized into SEIU Local 521, that all Santa Clara University and Stanford University workers be, and are hereby, reorganized into SEIU Local 2007, that all El Camino Hospital and Stanford/Lucille Packard Hospital workers be, and are hereby, reorganized into SEIU Local UHW, that Bon Appetit/Compass workers be, and are hereby reorganized into SEIU UNITE-HERE Service Workers United, and that all Santa Clara Mission Cemetery workers be, and are hereby, reorganized into SEIU Local 265, effective January 2, 2007, or as soon thereafter as practicable.

Dated: January 2, 2007

Andrew L. Stern
International President

SERVICE EMPLOYEES
INTERNATIONAL UNION
CTW, CLC

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EXHIBIT V



ANDREW L. STERN
International President

ANNA BURGER
International Secretary-Treasurer

MARY KAY HENRY
Executive Vice President

GERRY HUDSON
Executive Vice President

ELUSEO MEDINA
Executive Vice President

TOM WOODRUFF
Executive Vice President

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4944-900H

June 8, 2007

Mr. Bruce Smith
1598 Hillmont Avenue
San Jose, CA 95127

Re: Appointment as Trustee of SEIU Local 715

Dear Brother Smith:

This is to inform you that, pursuant to the authority vested in me by Article VIII, Section 7, of the International Constitution and Bylaws, I have appointed you as Trustee to take charge and control of the affairs of Service Employees International Union, Local 715, effective immediately.

I have enclosed the Order of Trusteeship, which should be posted immediately in the Local Union headquarters and in such other places as would best inform the membership of the imposition of Trusteeship.

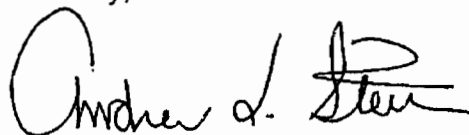
In the performance of your duties, you must comply fully with the provisions of the International Constitution and Bylaws and the provisions of Title III of the Labor Management Reporting and Disclosure Act ("LMRDA"), 29 U.S.C. §§ 461-466.

The office of the International Secretary-Treasurer will bond you in your new capacity as Trustee of the Local Union, effective as of the date of the imposition of the Trusteeship. Please note that anyone else who handles the funds or property of the Local Union must also be bonded in accordance with the requirements of the LMRDA.

Mr. Bruce Smith
June 8, 2007
Page 2

As Trustee, you are not to obligate the International Union for the payment of any bills or debts, past or future. This includes, but is not limited to, fees for lawyers, accountants, statisticians, economists, or similar professional personnel. If special circumstances arise requiring protection of the interests of the International Union, as distinguished from the interests of the Local Union, and in that connection the services of attorneys or other professionals are needed, you shall not retain any such persons or incur any indebtedness without my permission or the permission of a person authorized to act in my behalf. If you have any questions concerning your duties as Trustee, please contact this office.

In unity,

A handwritten signature in black ink, appearing to read "Andrew L. Stern". The signature is fluid and cursive, with a large initial "A" and a stylized "S".

Andrew L. Stern
International President

Enclosures

cc. Anna Burger, International Secretary-Treasurer
John Ronches, Assistant to International Secretary-Treasurer
JJ Johnston, Area Director

EXHIBIT W

SERVICE EMPLOYEES INTERNATIONAL UNION, CTW, CLC

In the Matter of the Trusteeship)	
Imposed on Service Employees	)	Marc Earls
International Union, Local 715	)	Hearing Officer
<hr/>		

**REPORT AND RECOMMENDATION
TO THE INTERNATIONAL EXECUTIVE BOARD**

PROCEDURAL BACKGROUND

I was appointed by the International Executive Board ("IEB") of the Service Employees International Union ("SEIU" or "International Union") to serve as hearing officer on the question whether an emergency trusteeship imposed on Service Employees International Union, Local 715, was properly implemented and should be continued. On June, 8, 2007, International President Andrew L. Stern issued an order imposing a trusteeship on Local 715 (Exhibit 2). In the order, President Stern stated that he had received a request from the officers and Executive Board of Local 715 for the imposition of an emergency trusteeship over Local 715 due to grave concerns of the Local 715 leadership about the ability of Local 715 to carry out its collective bargaining responsibilities and defend its status as collective bargaining representative of employees for whom Local 715 is the collective bargaining agent. President Stern appointed Bruce W. "Rusty" Smith, former Training Director and Senior Field Representation of SEIU Local 715, as Trustee to take charge of the affairs of the local. The trusteeship was imposed effective June 8, 2007. President Stern's order and my appointment by the International Executive Board were pursuant to the provisions of Article VIII, Section 7 of the SEIU Constitution and Bylaws (Exhibit 3).

On July 12, 2007, a hearing on the trusteeship was noticed for July 24, 2007 (Exhibit 1). The notice was provided to Local 715 members and former officers. The hearing commenced at 4:30 p.m. on July 24, 2007, at the local union office in Redwood City, California, and was attended by Trustee Smith and members of Local 715. Brother Smith gave testimony and entered two exhibits into evidence. I kept the record open until July 31, 2007, for the submission of additional materials.

FINDINGS

None of the relevant facts are in dispute. In the spring of 2006, hearing officers appointed by the SEIU International Executive Board held hearings throughout California concerning local union jurisdiction, including possible merger and consolidation, for public service employees and property services workers among others. On June 9, 2006, the hearing officers issued a Joint Report and Recommendations concerning local union jurisdiction in California, which recommended extensive reorganization of SEIU local unions in California. On June 10, 2006, the International Executive Board approved the hearing officers' Joint Report and Recommendations, including the recommendation of a membership vote on the proposed changes in California members' affiliation (Exhibit 4). On August 21, 2006, President Stern directed that a vote of the affected California membership take place. The vote was held and the ballots were counted on October 6, 2006. The membership approved the reorganization plan.

Pursuant to the approved reorganization plan, public sector and publicly-funded workers in California are being reorganized into four newly-created regional public sector locals, based on geography: Local 221, for locals in the Southern Region of California, Local 521, for locals in

the Central Northern Region, Local 721, for locals in the Central Southern Region, and Local 1021, for locals in the Northern Region.

Under the reorganization plan, with a few exceptions, members of Local 715 are being reorganized into Local 521, the Central Northern regional public local. Two of the exceptions are that Local 715 members employed by Santa Clara University and Stanford University (including members in a separate bargaining unit at the power generating facility at Stanford University) are to be reorganized into a new university local, and that Local 715 members employed by El Camino Hospital and Stanford and Lucille Packard Hospitals are to be reorganized into SEIU United Healthcare Workers – West (UHW).

On January 2, 2007, SEIU chartered the new regional California public locals, and President Stern issued orders implementing the reorganization of all affected California members into their new locals. After President Stern issued the reorganization order concerning Local 715, Local 715 began the process of reorganizing its members into their respective new unions and, for the most part, the reorganization process has gone smoothly. By the late spring of 2007, a significant majority of the Local 715 membership had been successfully reorganized into Local 521. However, there are still a number of Local 715 members who have not yet been reorganized into their new local unions, including the employees of Stanford Hospital and Clinics/Lucille Packard Hospital, El Camino Hospital, Stanford University, and Santa Clara University. There are approximately 3,500-4,000 members of SEIU Local 715 in seven jurisdictions who remain members of Local 715, and the Local still maintains a treasury.

The shift of a significant percentage of the Local 715 membership to Local 521 has resulted in the shift of the resources associated with those members to Local 521, which has hampered the ability of Local 715 to continue carrying out its collective bargaining

responsibilities with regard to the remaining Local 715 members who have not yet been reorganized and to defend its status as the collective bargaining agent of these members.

In addition to the challenges posed by the shift in resources, the process of reorganizing the remaining Local 715 members into their new unions has been openly thwarted and undermined by at least one employer. Since May 30, 2007, Stanford Hospital and Clinics has taken the position that Local 715 no longer exists, it has refused to recognize UHW as Local 715's servicing agent, and it has prevented UHW staff from having access to Local 715 members on Hospital premises, making it exceedingly difficult for UHW to service these members, as it is obligated to do under the servicing agreement between Local 715 and UHW. The evidence establishes that Stanford Hospital is manipulating the transition period to thwart Local 715's status as collective bargaining agent, thereby threatening the collectively-bargained rights of Local 715 members at Stanford Hospital and Clinics.

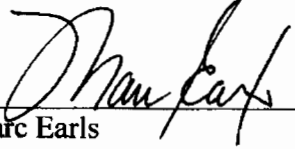
Based on the factors detailed above, on June 4, 2007, Kristina M. Sermersheim, Executive Secretary of Local 715, acting on behalf of the officers and Board of Directors of Local 715, and upon a unanimous vote of the Local 715 Executive Board, requested that President Stern impose an emergency trusteeship on Local 715 (Exhibit 5). President Stern granted Local 715's request and placed Local 715 into trusteeship on June 8, 2007.

RECOMMENDATION

It is plain that the trusteeship imposed by President Stern over Local 715 was properly imposed. The Local continues to have collective bargaining responsibilities and must continue to manage its resources, even as members and resources are shifted to other SEIU local unions. The Local was having serious difficulty protecting the collectively bargained rights of its

remaining members given its dwindling membership base and the concerted efforts of one key employer to undermine Local 715 status as collective bargaining agent. Accordingly, I recommend that the trusteeship be continued in order to assure Local 715's performance of its collective bargaining responsibilities. The approximately 4,000 remaining Local 715 members deserve full representation during this transition process. The trustee should do his utmost to assure the reorganization of remaining Local 715 members pursuant to the IEB's June 2006 reorganization decision, in a manner that protects the collectively bargained rights of these members.

Respectfully submitted,



Marc Earls
Hearing Officer

Dated: August 13, 2007

EXHIBIT X



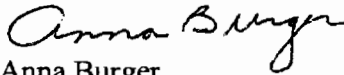
August 23, 2007

Bruce W. ("Rusty") Smith, Trustee
SEIU Local 715
2302 Zanker Rd
San Jose, CA 95134

Dear Brother Smith:

On August 13, 2007, Hearing Officer Marc Earls submitted his report and recommendation to the International Executive Board on the Emergency Trusteeship imposed upon SEIU Local 715. The International Executive Board reviewed the report and recommendation and adopted the report and recommendation in its entirety. A copy of the report and recommendation is enclosed.

In unity,


Anna Burger
International Secretary-Treasurer

Enclosure

cc: Andrew L. Stern, International President
Marc Earls, Hearing Officer
Kristy Sermersheim, International Vice President
John Ronches, Assistant to the International Secretary-Treasurer
J.J. Johnston, Jr., Area Director
Former SEIU Local 715 Officers and Executive Board Members

SERVICE EMPLOYEES
INTERNATIONAL UNION
CTW, CLC

1800 Massachusetts Ave NW
Washington DC 20036

202.730.7000
TDD: 202.898.3481
www.SEIU.org

EXHIBIT Y

U.S. Department of Labor
Office of Labor-Management
Standards
Washington, DC 20210

FORM LM-15 TRUSTEESHIP REPORT

Form approved
Office of Management
and Budget
No. 1215-0188
Expires 11-30-2009

For Official Use
Only

This report is mandatory under P.L. 86-257 as amended. Failure to comply may result in criminal prosecution, fines, or civil penalties as provided by 29 U.S.C. 461.

READ THE INSTRUCTIONS CAREFULLY BEFORE PREPARING THIS REPORT.

1. File Number of Labor Organization Held in Trusteeship 513-588	2. Type of Report Initial (complete pages 1 through 4.) <input checked="" type="checkbox"/> Semiannual for period ending (Complete pages 1 and 2 only.) 12 / 8 / 2007	3. Date Trusteeship Established 6 / 8 / 2007
4. Labor Organization Held in Trusteeship Affiliation or Organization Name Service Employees International Union Designation LU - Local Union Designation Number 715 Unit Name (if any) P.O. Box, Bldg. and Room No., if any Number and Street 2302 Zanker Road City San Jose State California ZIP Code + 4 95134		
5. Labor Organization Imposing the Trusteeship Name Service Employees International Union File Number 000-137 P.O. Box, Building and Room Number, if any Number and Street 1800 Massachusetts Avenue, NW City Washington State District of Columbia ZIP Code + 4 20036		
6. List the article(s) and section(s) of the constitution which specifically authorize imposition of the trusteeship: Article VIII, Sections 7(a) and 7(f).		

Signatures

Each of the undersigned, duly authorized officials of the labor organization imposing the trusteeship over the above labor organization, declares, under penalty of perjury and other applicable penalties of law, that all of the information submitted in this report (including the information contained in any accompanying documents) has been examined by the signatory and is, to the best of the undersigned's knowledge and belief, true, correct, and complete. (See the section on penalties in the instructions.)

24. Signed <u>Andrew J. Stein</u> Other (Specify) International President On <u>5/20/08</u> (202) 730-7000 Date Telephone Number	President (if other title, see instructions.)	26. Signed <u>DW Smith</u> Trustee On <u>05/19/08</u> (408) 954-1538 Date Telephone Number	Trustee (if other title, see instructions.)
25. Signed <u>Anna Bragman</u> Other (Specify) International Secretary-Treasurer On <u>5/20/08</u> (202) 730-7000 Date Telephone Number	Treasurer (if other title, see instructions.)	27. Signed _____ Trustee On _____ Date Telephone Number	Trustee (if other title, see instructions.)

Name of Labor Organization Held In Trusteeship Service Employees International Union	File Number 513-588
---	------------------------

7. Check the reason(s) for establishing or continuing the trusteeship:

- a. To correct corruption or financial malpractice.
- ☒ b. To assure the performance of collective bargaining agreements or other duties of a bargaining representative.
- c. To restore democratic procedures.
- d. Other.

8. Provide a detailed statement which explains each reason checked in Item 7, above.

As the result of changes in the jurisdiction of SEIU local unions in California, Local 715 is in the process of reorganizing the majority of its members into other SEIU local unions. The shift of a large majority of Local 715 members, and resources associated with those members, to other SEIU unions is making it difficult for Local 715 to carry out its remaining collective bargaining responsibilities and to defend its status as collective bargaining agent. The significant decline in Local 715's membership and resources has impaired Local 715's ability to operate as contemplated by the Local 715 Constitution and Bylaws. The process of reorganizing the remaining Local 715 members into their new SEIU local unions is still underway.

9. During the period covered by this report

- a. Did a convention or other policy-determining body meet to which the trustee labor organization sent delegates or would have sent delegates if not in trusteeship?

Yes ☒ No

(if the answer is "Yes," complete and file Form LM-15A.)

- b. Did the labor organization imposing the trusteeship hold an election of officers?

Yes ☒ No

(if the answer is "Yes," complete and file Form LM-15A.)

EXHIBIT Z



**ORDER OF EMERGENCY TRUSTEESHIP
APPOINTING A TRUSTEE
TO TAKE CHARGE AND CONTROL OF THE AFFAIRS OF
SERVICE EMPLOYEES INTERNATIONAL UNION, LOCAL 715**

To: All Officers and Members of Service Employees International Union, Local 715

Pursuant to my authority under Article VIII, Sections 7(a) and (f), of the SEIU Constitution and Bylaws, I have determined that an emergency situation exists within Service Employees International Union, Local 715 (hereinafter "Local 715"), and that in order to protect the interests of the membership, the immediate appointment of a Trustee is necessary for the purpose of assuring preservation of the union's status as collective bargaining representative and its performance of collective bargaining duties and functions, and otherwise carrying out the legitimate objects of the International Union.

I have received a request from the officers and Executive Board of Local 715 requesting the imposition of the emergency trusteeship due to the difficulties the Local Union is experiencing in performing its collective bargaining duties due to the shift of members and resources to other SEIU local unions. Local 715 is in the process of reorganizing most of its members into Local 521 pursuant to the International Executive Board's June 2006 decision on California jurisdiction. At this point, many members of Local 715 have moved into Local 521 in accordance with this decision. However, Local 715 still retains collective bargaining responsibilities on behalf of members who have not yet been moved into the successor local union. Local 715's responsibilities include the representation of employees and Stanford Hospital and Clinics/Lucile Packard Children's Hospital. Pursuant to the IEB's decision, Local 715's Stanford Hospital members will be united with other SEIU healthcare members in SEIU United Healthcare Workers – West ("UHW").

Reports I have received indicate that, since May 30, 2007, the Hospital has taken the position that Local 715 no longer exists, and the Hospital is refusing to recognize Local 715's servicing agent, UHW. The Hospital's actions threaten to deprive Local 715 members at Stanford Hospital of their collectively-bargained rights. The shift of a large majority of Local 715 members, and resources associated with those members, to Local 521, is making it difficult for Local 715 to carry out its remaining collective bargaining responsibilities and to defend its status as collective bargaining agent. The significant decline in Local 715's membership and resources has impaired the Local's ability to operate as contemplated by the Local 715 constitution and bylaws.

ANDREW L. STERN
International President

ANNA BURGER
International Secretary-Treasurer

MARY KAY HENRY
Executive Vice President

GERRY HUDSON
Executive Vice President

EUSEO MEDINA
Executive Vice President

TOM WOODRUFF
Executive Vice President

SERVICE EMPLOYEES
INTERNATIONAL UNION
CTW, CLC

1800 Massachusetts Ave NW
Washington DC 20036

202.730.7000

TDD: 202.730.7481

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4946-0004

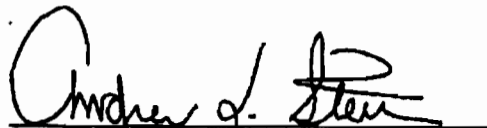
SEIU0001

From the information that I have received, including the request from the Local 715 officers and Executive Board for imposition of an emergency trusteeship over Local 715, I have determined that placing Local 715 under trusteeship is the best means of preventing disruption of contracts, assuring that the Local Union performs its duties as collective bargaining representative, protecting the interests of the membership, and otherwise carrying out the legitimate objects of the International Union. Further, I have determined that an emergency exists that justifies pre-hearing appointment of a Trustee. Therefore, in light of the situation facing Local 715 and by virtue of my authority as International President, I have this date appointed Rusty Smith as Trustee of Local 715, with all of the powers that he is entitled to assume under the SEIU Constitution and Bylaws and applicable law. The Trustee shall assume responsibility for Local 715 immediately.

The Local Union's Constitution and Bylaws are suspended for the period of the Trusteeship. By operation of this Order of Emergency Trusteeship and pursuant to my authority under Article VIII of the SEIU Constitution and Bylaws, I hereby remove all Local 715 officers, including Executive Board members, representatives and employees of Local 715. In accordance with Article VIII, Section 7(f) of the SEIU Constitution, I will request that the International Executive Board appoint a hearing officer and that a Notice of Hearing and Appointment of a Hearing Officer be issued in the very near future. Consistent with this notice, a hearing regarding the imposition of an emergency trusteeship over Local 715 will be held within the time limits set forth in Article VIII, Section 7(f).

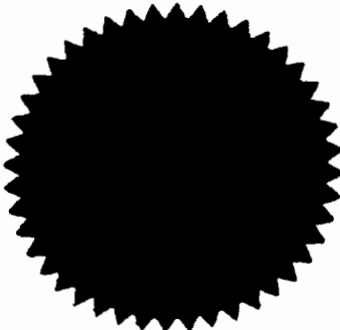
I am requesting that all members and employees of Local 715 cooperate with the Trustee in every respect. All former officers, representatives and employees of the Local Union should immediately make available to the Trustee all books, records, funds and other property of the Local Union in their possession and control.

Dated this 8th day of June, 2007.



Andrew L. Stern
International President

cc: Anna Burger, International Secretary Treasurer
Kristy Sermersheim, Executive Secretary, Local 715
Former Executive Board Members, Local 715
Rusty Smith, Trustee



SEIU0002

EXHIBIT AA

06/14/2007 16:13 FAX 408 954 1

SEIU 521

001/003

LOCAL 715



DATE: 6/14/07

TO: Laurie Quintel

C/O: _____

FROM: Busty Smith

Cover Page + 2 page(s)

☐ Urgent ☐ For Review ☐ Please Comment ☐ Please Reply ☐ Please Recycle

Message: _____

C: _____

NOTE: IF FACSIMILE IS MISREDIRECTED

The page(s) comprising this facsimile transmission contain confidential information from SEIU Local 715. This information is intended solely for use by the individual or entity named as the recipient hereof. If you are not the intended recipient, be aware that any disclosure, copying, distribution, or use of the contents of this transmission is prohibited. If you have received this transmission in error, please notify us by telephone immediately.

SAN JOSE OFFICE

2302 ZANKER ROAD, SAN JOSE, CA 95131 ■ 408-954-8715 ■ Fax: 408-954-1538

REDWOOD CITY OFFICE

891 MARSHALL STREET, REDWOOD CITY, CA 94038 ■ 650-365-8715 ■ Fax: 650-365-7956

STANFORD OFFICE

P.O. BOX 19152, STANFORD, CA 94309 ■ 650-723-3680 ■ Fax: 650-723-3650

© 2003 SEIU 715, SEIU 815-001/003 Rev 06/04/03 (Office Forms Fax Cover Sheet.pdf) REV. 16-03

SEIU0003

06/14/2007 16:13 FAX 408 854 1113

SEIU 521

002/003

June 14, 2007

Via Facsimile and U.S. Mail

Laurie J. Qunitel, Director -- Employee and Labor Relations
Stanford Hospital and Clinics
300 Pasteur Drive M/C 5513
Stanford, CA 94305-5513

Dear Ms. Qunitel:

On June 8, 2007, the International President of the Service Employees International Union ("SEIU"), CIO, CLC, Andrew L. Stern, acting pursuant to Article VIII, Section 7 of the International Union's Constitution and Bylaws and applicable federal law, took control of all operations of SEIU Local 715 ("Local 715"). A copy of the official Trusteeship Order is attached hereto.

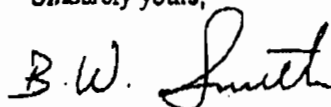
All officers of Local 715 have been removed. President Stern appointed me as the Trustee with full authority to act on behalf of Local 715.

Effective June 8, 2007, all matters relating to the representation of the employees of your organization under the Local 715 collective bargaining agreement will be handled under my direction. We intend to fulfill all of our collective bargaining obligations, and expect no interruption in the provision of services to our members.

All servicing agreements to which Local 715 is a party will remain in full force and effect in every respect, without any change whatsoever. Accordingly, Kim Tavaglione, Jocelyn Olick, and Ella Hereth will continue to be the representative responsible for servicing your facility.

If you have any questions, please feel free to call me at 408-316-4460.
Thank you.

Sincerely yours,



Bruce W. ("Rusty") Smith
International Trustee

Attachment

SEIU0004

06/14/2007 16:13 FAX 408 954 1

SEIU 521

003/003



June 8, 2007

TO WHOM IT MAY CONCERN:

In accordance with the powers vested in me by the Constitution and Bylaws of the Service Employees International Union, CIO, CLC, I have appointed Bruce W. Smith as Trustee over the affairs of SEIU Local 715, effective immediately.

The Trustee will have charge of the affairs of the Local Union until relieved of responsibility by me.

The Trustee will be governed by the provisions of the Service Employees International Union Constitution and Bylaws and the provisions of applicable law.

Sincerely,

Andrew L. Stern
International President

ANDREW L. STERN
International President

ANNA BURGER
International Secretary-Treasurer

MARY KAY HENRY
Executive Vice President

GERRY HUDSON
Executive Vice President

ELISEO MEDINA
Executive Vice President

TOM WOODKUFF
Executive Vice President

SERVICE EMPLOYEES
INTERNATIONAL UNION
CIO, CLC

1000 Massachusetts Ave NW
Washington DC 20036

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TDD: 202.730.7481
www.SEIU.org

1-800-451-2000

SEIU0005

EXHIBIT BB



www.seiu715.org

LOCAL 715

SERVICE EMPLOYEES INTERNATIONAL UNION

Via Facsimile

June 18, 2007

Laurie J. Quintel, Director
Employee and Labor Relations
Stanford Hospital and Clinics
300 Pasteur Drive – M/C 5513
Stanford, CA 94305-5513

Dear Ms. Quintel:

On June 8, 2007, the International President of the Service Employees International Union ("SEIU"), CTW, CLC, Andrew L. Stern, acting pursuant to Article VIII, Section 7 of the International Union's Constitution and Bylaws and applicable federal law, took control of all operations of SEIU Local 715 ("Local 715"). A copy of the official Trusteeship Order is attached hereto.

All officers of Local 715 have been removed. President Stern appointed me as the Trustee with full authority to act on behalf of Local 715.

Effective June 8, 2007, all matters relating to the representation of the employees of your organization under the Local 715 collective bargaining agreement will be handled under my direction. We intend to fulfill all of our collective bargaining obligations, and expect no interruption in the provision of services to our members.

All servicing agreements to which Local 715 is a party will remain in full force and effect in every respect, without any change whatsoever. Accordingly, Kim Tavaglione, Jocelyn Olick, and Ella Hereth will continue to be the representative responsible for servicing your facility.

If you have any questions, please feel free to call me at 408-316-4460. Thank you.

Sincerely yours,

A handwritten signature in black ink, appearing to read "Bruce W. Smith".

Bruce W. ("Rusty") Smith
International Trustee

SEIU0006

Enclosure

San Jose Office: 2302 Zanker Road, San Jose, CA 95131-1115 • (408) 954-8715 • Fax (408) 954-1538
Redwood City Office: 891 Marshall Street, Redwood City, CA 94063 • (650) 365-8715 • Fax (650) 365-7956
Stanford Office: P.O.Box 19152, Stanford, CA 94309 • (650) 723-3680 • Fax (650) 723-3650

Affiliated SEIU 1972



page 1



June 8, 2007

TO WHOM IT MAY CONCERN:

In accordance with the powers vested in me by the Constitution and Bylaws of the Service Employees International Union, CtW, CLC, I have appointed Bruce W. Smith as Trustee over the affairs of SEIU Local 715, effective immediately.

The Trustee will have charge of the affairs of the Local Union until relieved of responsibility by me.

The Trustee will be governed by the provisions of the Service Employees International Union Constitution and Bylaws and the provisions of applicable law.

Sincerely,

A handwritten signature in black ink, appearing to read 'Andrew L. Stern', is written over a large, solid black circular stamp.

Andrew L. Stern
International President

ANDREW L. STERN
International President

ANNA BURGER
International Secretary-Treasurer

MARY KAY HENRY
Executive Vice President

GERRY HUDSON
Executive Vice President

ELISEO MEDINA
Executive Vice President

TOM WOODRUFF
Executive Vice President

SERVICE EMPLOYEES
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CtW, CLC

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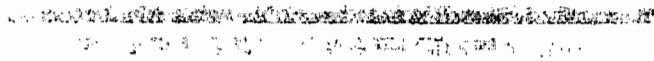
4444 9024

SEIU0007

EXHIBIT CC

SEIU - Home Page

Page 1 of 1



Contact Us


10

**SEIU Local 715
2302 Zanker Road
San Jose, CA 95131
(408) 954-8715**

SEIU0010

Contact Us

Page 1 of 1


[Illegible text]

Contact Us

**SEIU Local 715
2302 Zanker Road
San Jose, CA 95131
(408) 954-8715**

SEIU0011

Benefits

Page 1 of 2

SEIU Benefits for You and Your Family

SEIU Local 715

2302 Zanker Road

San Jose, CA 95131

(408) 954-8715

Because you are a member or retiree of SEIU, you have access to a variety of services and discounts through Union Plus. These benefits supplement what you may receive through your union-negotiated contract. With these SEIU-Union Plus benefits, you can save on life insurance, health savings, mortgages, legal services, and more.

Need assistance?
Call 1-800-452-9425.
Or visit www.unionplus.org.

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Credit Card with great value and service

Secured Credit Card for members who have poor credit or little or no credit history

Loans—personal loans, lines of credit, and home equity loans

Credit Counseling to help eliminate debt

Your Credit Score for a 15% discount

Family Services

Find a Lawyer—Union Plus legal services for your Local

Immigration Legal Services including free initial consultations and discounts on hourly rates

Planning for College—resources on applying, paying, and more

Paying for College—resources include loans, financial aid, and savings plans

Pet Health—savings on veterinary services for all animals

House and Home

Mortgage and Real Estate—low down payments and reduced closing costs

Home Heating Oil Discounts—save on service contracts and fuel oil purchases

Moving Van Discounts—Save on interstate moves, truck rentals, and storage

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Health Savings reduces out-of-pocket expenses for prescriptions, vision, and other services

Health Club Discounts at more than 1,500 locations

Insurance Protection

Life Insurance protection regardless of job or health conditions

Accident Insurance including insurance for accidental death in the workplace

Auto Insurance with

Union Marketplace

Cingular Wireless Discounts on monthly service for union members

Auto Buying Service, to help you find the right vehicle for the right price

Goodyear Discounts on tires

SEIU0012

Benefits

Page 2 of 2

competitive rates, multi-vehicle discounts, and 24-hour service

Professional Liability Insurance for medical professionals

Pet Insurance --accident and illness insurance for your dog or cat

SEIU Scholarships

SEIU Scholarship Program

Jesse Jackson Scholarship

John Gegan Scholarship

Moe Foner Scholarship

Nora Piore Scholarship

Union Plus Scholarship Program

Computers

Dell Computers for a 5-10% discount

and service

Powell's Bookstore --a union-organized online bookstore

Union-Made Clothing --support good jobs at good pay with a discount

Union-Made Checks with your union's logo

Travel and Recreation

Vacation Tours with a discount

Norwegian Cruise Line discounts

Car Rentals for up to 25% off

Gift Shop

Flowers --delivery service with a discount

SEIU0013

Our Local

Page 1 of 1

Contact Us

SEIU Local 715
2302 Zanker Road
San Jose, CA 95131
(408) 954-8715

About SEIU

The Service Employees International Union is 1.8 million working people and 50,000 retirees united to improve services and our communities throughout North America.

SEIU members are winning better wages, health care, and more secure jobs at home, while uniting their strength with their counterparts around the world to help ensure that workers, not just corporations and CEOs, benefit from today's global economy.

SEIU is the fastest-growing union in North America. Focused on uniting workers in three sectors to improve their lives and the services they provide, SEIU is:

- »»The largest health care union, with 900,000 members in the field, including nurses, LPNs, doctors, lab technicians, nursing home workers, home care workers
- »»The largest property services union, with 225,000 members in the building cleaning and security industries, including janitors, door men and women
- »»The second largest public services union, with 850,000 local and state government workers, public school employees, bus drivers, and child care providers

(Total is current as of 09-27-05, and exceeds 1.8 million due to overlaps in public/health care.)



SEIU0014

Action Center

Page 1 of 1

What is COPE?

COPE is our union's voluntary bi-partisan Political Action Committee used for political and legislative activities. We hold politicians accountable at every level of government.

[Read more](#)

What Is Change to Win?

The Change to Win Federation is made up of SEIU and six other national unions representing more than 5 million workers.

[Read more](#)

Around SEIU

Page 1 of 1

SEIU's Stern, Rivera Named Two of Top Six Most Powerful in Healthcare

Modern Healthcare magazine released its "100 Most Powerful People in Healthcare" list, ranking SEIU President Andy Stern and SEIU Healthcare Chair Dennis Rivera number 5 and 6, respectively. This recognition comes during a year of landmark healthcare leadership, initiatives, and policy work for SEIU, including the formation in June of SEIU Healthcare, a new one million member "union within a union."

[Read more](#)

What Is Change to Win?

The Change to Win Federation is made up of SEIU and six other national unions representing more than 5 million workers.

[Read more](#)

SEIU0016

California Budget: the Year of Reckoning



The Latest on the Budget Campaign: May Revise a Missed Opportunity

On May 14, the Governor unveiled his revised budget and proposed deeper cuts, a power grab, and more borrowing, not real solutions. In other words, he missed an opportunity to fix our chronic budget problems. Now, legislators must take responsibility. Read [SEIU's reaction](#) to the proposed budget and our latest [update and analysis](#) of the cuts.

[Read More](#)

June Primary Election Results

Election Update: SEIU Wins Major Victories, Defeating Prop. 98 and Helping Scores of Working-Family-Friendly Candidates Advance

In the June primary election, SEIU helped defeat the dangerous and deceptive Prop. 98, which would have gutted rent control and environmental laws and made it nearly impossible to build public works, by a 61% (No) - 39% (Yes) margin. We also helped pass real homeowner protection, Prop. 99, in a 62.5% (Yes) - 37.5% (No) vote.

For the California Assembly races - in a remarkable sweep - in every district where we endorsed a candidate, we won, and a 2/3 majority of SEIU-backed candidates won their Senate seats as well. In Congress, we helped Mike Lumpkin (D, CD 52) win his primary in the only district without an incumbent running. And in a closely watched, key local race, SEIU and labor allies helped lift longtime champion of working people Senator Mark Ridley-Thomas above the crowd in his L.A. County Supervisor bid, positioning him well for a November run-off.

[Click here](#) for a complete list of SEIU endorsements and results.

Progress on Healthcare: A Three-Year Plan

Healthcare Reform Bills Make Progress

While our primary healthcare goal this year must be to stop the devastating budget cuts that would add a million Californians to the rolls of the uninsured, SEIU continues to push for components of the healthcare reform package we fought for in 2007. Working with our allies from last year's "It's OUR Healthcare!" campaign, we continue to lay the groundwork for comprehensive reform by tackling a range of

State Budget News Clips

California's budget is a thing of shreds of patches

Lottery plan off target

Aid for California's disabled in peril

Governor's lottery plan could hurt school funding, analyst says

Senator says California prisons upgrade cost 'borders on the incredible'

Who Pays Taxes in California

Press Releases

SEIU California State Council Announces Selection of New Executive Director

Assembly Budget Moves Debate in the Right Direction

SEIU Says Governor's Budget Will Hurt California

SEIU, Health Care Groups Win Promise to Amend Flawed Health Care Bill

Parents, providers blast Gov.'s veto on child care reform

Members Are Speaking Out!



"As a children's social worker, our primary responsibility is to protect children and make sure they have safe, permanent homes. Our

SEIU0017

critical healthcare issues. Some of the key reform components have made legislative progress in recent weeks, including:

- Giving consumers more information about healthcare costs and quality, so that consumers have real choices and can shape the healthcare market by avoiding costly and ineffective care AB2967 (Lieber)
- Prohibiting junk insurance and standardizing the insurance market SB1522 (Steinberg)

Read the latest update as these bills continue to make progress through the legislature from ally [Health Access](#).

Link to this update:

<http://www.health-access.org/labels/YearOfReform.htm>

system functions as the children's parents while we help their parents recover, or find a family member or foster parents. We're fighting for the children and families we serve. The children aren't voters. They have no voice. They're the most vulnerable members of our society.

That's why I became a social worker, and that's why I'm fighting the budget cuts."

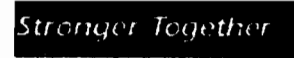
SEIU Local 721 David Green - Adoption Social Worker, County of Los Angeles

[- Read more](#)

SEIU0018

SEIU Online Store

Page 1 of 1



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SEIU0019

EXHIBIT DD

AUG-16-2006 10:33

FROM-LOCAL 250 SAN FRANCISCO

415-563-8814


T-060 P.001/004 F-156



www.seiu715.org

LOCAL 715

SERVICE EMPLOYEES INTERNATIONAL UNION, AFL-CIO/CLC

TO: Laurie Quintel
FR: Greg P. 
SEIU servicing
agreement.
4 pages
Any questions, please
call (415) 740-4461

San Jose Office: 2302 Zanker Road, San Jose, CA 95131-1115 • (408) 954-8715 • Fax (408) 954-1538
Redwood City Office: 891 Marshall Street, Redwood City, CA 94063 • (650) 365-8715 • Fax (650) 365-1538
Stanford Office: P.O. Box 19152, Stanford, CA 94309 • (650) 723-3680 • Fax (650) 723-3650

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SEIU0020

16

AUG-15-2006 10:33

FROM-LOCAL 250 SAN FRANCISCO

415-563-8814

T-060 P.002/004 F-155

SERVICING AGREEMENT

This **SERVICING AGREEMENT** is entered into between Local 715 ("Local 715") and SEIU UHW ("UHW").

WHEREAS, Local 715 and UHW recognize that the core jurisdiction represented by Local 715 includes public sector employees and that the core jurisdiction of UHW includes health care employees; and

WHEREAS, Local 715 and UHW recognize that the professional services provided by each organization are most highly developed in regard to their core jurisdictions; and

WHEREAS, Local 715 is the sole and exclusive collective bargaining representative for a unit of employees at the Stanford Hospital facility ("Stanford facility"); and

WHEREAS, Local 715 wishes to obtain for its members at the Stanford facility the professional services available through UHW, and UHW is willing to make its professional services available to Local 715's members at the Stanford facility; now,

THEFORE, it is AGREED as FOLLOWS:

1. **Effective Date**

The terms of this Servicing Agreement shall become effective on March 1, 2006.

2. **Cost of Services**

For a period running concurrently with the existing collective bargaining agreement between Local 715 and the Stanford facility, UHW shall provide the professional services outlined herein at no cost to Local 715. Thereafter, if this Agreement is extended, Local 715 shall reimburse UHW for the costs of the services outlined herein from the dues and agency fees collected by UHW for each Local 715 member affected by this Agreement.

3. **Duration of Agreement**

This Servicing Agreement shall be effective on March 1, 2006 and shall remain in full force and effect until the end of the current collective bargaining agreement between Local 715 and the Stanford facility. The duration of this Servicing Agreement may be mutually extended by the parties. Additionally, this Agreement can be altered, amended, or rescinded by the mutual agreement of the parties. Either party may unilaterally terminate this Agreement by giving three months notice to the other party.

{w-200000101106020678 DOC}

SEIU0021

RECEIVED AUG-14-06 12:48

FROM-

TO-SEIU UHW SF

PAGE 002

AUG-18-2006 10:34

FROM-LOCAL 250 SAN FRANCISCO

415-553-8814

T-060 P.003/004 F-153

4. Services Provided By UHW

For the duration of this Servicing Agreement, UHW's staff, acting as designated agents of Local 715, shall provide the following professional services to Local 715 for its members at the Stanford facility:

Representation in the grievance procedure and at arbitration hearings

Representation at labor-management meetings

Assistance to members appearing before the National Labor Relations Board on behalf of the Local 715 Chapter at the Stanford facility.

5. Overnight By Local 715

The UHW staff member assigned to the day-to-day servicing of the Stanford facility unit will meet on a regular basis with an officer of Local 715 to review the status of representation matters within the unit. In addition, UHW will provide Local 715 with advance notice of all membership meetings and site visits and clear all correspondence with Local 715. The parties acknowledge that Local 715 has the ultimate responsibility for collective bargaining matters on behalf of the Stanford facility unit.

6. Services Provided By Local 715

For the duration of this Agreement, Local 715 shall continue to administer the collection of membership dues, and shall have access to, and may assist with, all membership meetings, and shall have access to all records associated with the bargaining unit.

7. Designation of Agency Status

Local 715 shall notify the Employer in writing of its designation of the appropriate employees of UHW to serve as the agents of Local 715 in providing services to Local 715's membership at the Stanford facility.

Should the Employer challenge or refuse to accept the legitimacy of this Servicing Agreement, the parties will cooperate in processing the legal actions necessary to its enforcement. (This may include filing an unfair labor practice charge under the name of Local 715). UHW will provide professional assistance in this process. During the pendency of this process, Local 715 will continue to provide representation and the administration of all aspects of the collective bargaining agreement through its own staff until such matter is resolved.

8. Chapter Structure and Members' Rights

a) Following the implementation of this Servicing Agreement, Local 715's unit at the Stanford facility shall maintain the same officers and other employee-representatives, under the same internal Chapter structure that existed prior to implementation of this Agreement;

{W:\20070810\106000738.DOC}2

SEIU0022

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FROM-

TO-SEIU UHW SF

PAGE 008

AUG-15-2006 10:34

FROM-LOCAL 250 SAN FRANCISCO

415-559-9814

T-060 P.004/004 F-156

h) Following implementation of this Servicing Agreement, Local 715 members at the Stanford facility will continue to be full members of Local 715, with the right to vote in Local 715 elections and otherwise participate in Local 715's affairs. Employees in the bargaining unit will be offered Associate Member status with UHW but shall keep whatever membership rights are accorded them under the Local 715 by-laws and the Service Employees International Union constitution;

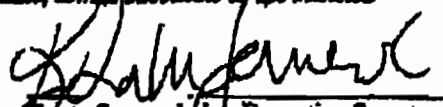
i) Nothing herein shall prohibit UHW from permitting Local 715's Chapter leaders or members from the Stanford facility to participate in UHW educational functions, or appearing as guests at other UHW functions.

2. Severability

The parties hereto believe that all provisions of this Servicing Agreement comply with applicable law. However, should any provision of this Agreement be found illegal by any tribunal of competent jurisdiction, this shall not affect the remainder of the Agreement. Rather, the parties shall promptly meet to negotiate an acceptable, lawful substitute to the stricken provisions.


Sal Roselli, President, UHW

Date


Kristy Serrano, Executive Secretary,
Local 715

Date

(W:\2006\05\07\060047\DOC)3

SEIU0023

RECEIVED AUG-14-06 10:40

FROM-

TO-SEIU UHW SF

PAGE 004

EXHIBIT EE

08/17/2008 10:57 FAX 408 954 1538

LOCAL 715

002/005

STEWART VANDERBILT
DAVID A. ROSENBERG
WILLIAM A. SOKOL
VICTOR A. HARRINGTON, JR.
W. DANIEL SCONE
ELVINE MICHELSON
BARRY S. KIRBY
JAMES BUTCHARD
SANDRA E. EBERSON
CHRISTIAN L. BARNER
JAMES J. VERRON
WILLIAM FRANKLIN
ANTONIO RUIZ
MATTHEW J. CALDER
ARLEY S. SEIDA
LINDA SALOWAY-COOPER
PATRICIA A. SHIFF
ALAN S. CROWLEY
J. FELIX LA TORRE
REYNOLD L. WILLIAM
ANGELA LAMONICA
EMILY P. RICH

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WILLIAM A. HARRIS
CONCEPCION E. LOPEZ-SANCHEZ
GILBERT P. HERRERA
LANCE E. MORGAN
MARIAN CHAVEZ

PATRICIA M. GAYNE, Of Counsel
ROBERTA D. PEREZ, Of Counsel
JOHN FLOTE, Of Counsel

* Also admitted to practice
in California in Hawaii
** Also admitted in Missouri

August 11, 2006

Larry Arnold
Foley & Lardner
One Maritime Plaza, Sixth Floor
San Francisco, CA 94111-3404

Re: SEIU United Healthcare Workers-West and SEIU Local 715
Stanford Medical Center

Dear Mr. Arnold:

Enclosed please find a copy of the Servicing Agreement with respect to the Stanford Medical Center Bargaining Unit, between Local 715 and UHW.

I am sending this to you at your request, so there will be no further confusion concerning this matter, and so that henceforth, the Employer will understand and recognize the fact that SEIU Local 715 is the bargaining representative, but is being aided by UHW.

Lest it is not apparent from the document, it is modeled directly and completely on servicing agreements approved by the NLRB.

I trust this will resolve this henceforth.

Sincerely,

William A. Sokol
William A. Sokol

WAS/rfb
opeiu 3 afl-cio(1)
Enclosure

cc: Greg Pullman
Kristy Sermersheim
John Borsos
Sal Russell

1/430729

SEIU0024

PASADENA OFFICE
301 North Lake Avenue, Suite 310
Pasadena, CA 91101-5122
TEL 626.796.8232 FAX 626.796.8888

SACRAMENTO OFFICE
422 J Street, Suite 520
Sacramento, CA 95814-2341
TEL 916.443.8800 FAX 916.442.0244

HONOLULU OFFICE
1088 Alakoa Street, Suite 1802
Honolulu, HI 96813-4500
TEL 808.528.8880 FAX 808.528.8881

RECEIVED AUG-17-06 09:58

FROM-408 954 1538

TO-SEIU

PAGE 002

SERVICING AGREEMENT

This **SERVICING AGREEMENT** is entered into between Local 715 ("Local 715") and SEIU UHW ("UHW").

WHEREAS, Local 715 and UHW recognize that the core jurisdiction represented by Local 715 includes public sector employees and that the core jurisdiction of UHW includes health care employees; and

WHEREAS, Local 715 and UHW recognize that the professional services provided by each organization are most highly developed in regard to their core jurisdictions; and

WHEREAS, Local 715 is the sole and exclusive collective bargaining representative for a unit of employees at the Stanford Hospital facility ("Stanford facility"); and

WHEREAS, Local 715 wishes to obtain for its members at the Stanford facility the professional services available through UHW, and UHW is willing to make its professional services available to Local 715's members at the Stanford facility; now,

THEREFORE, it is AGREED as FOLLOWS:

1. **Effective Date**

The terms of this Servicing Agreement shall become effective on March 1, 2006.

2. **Cost of Services**

For a period running concurrently with the existing collective bargaining agreement between Local 715 and the Stanford facility, UHW shall provide the professional services outlined herein at no cost to Local 715. Thereafter, if this Agreement is extended, Local 715 shall reimburse UHW for the costs of the services outlined herein from the dues and agency fees collected by UHW for each Local 715 member affected by this Agreement.

3. **Duration of Agreement**

This Servicing Agreement shall be effective on March 1, 2006 and shall remain in full force and effect until the end of the current collective bargaining agreement between Local 715 and the Stanford facility. The duration of this Servicing Agreement may be mutually extended by the parties. Additionally, this Agreement can be altered, amended, or rescinded by the mutual agreement of the parties. Either party may unilaterally terminate this Agreement by giving three months notice to the other party.

4. **Services Provided By UHW**

For the duration of this Servicing Agreement, UHW's staff, acting as designated agents of Local 715, shall provide the following professional services to Local 715 for its members at the Stanford facility:

Representation in the grievance procedure and at arbitration hearings

Representation at labor-management meetings

Assistance to members appearing before the National Labor Relations Board on behalf of the Local 715 Chapter at the Stanford facility.

5. **Oversight By Local 715**

The UHW staff member assigned to the day-to-day servicing of the Stanford facility unit will meet on a regular basis with an officer of Local 715 to review the status of representation matters within the unit. In addition, UHW will provide Local 715 with advance notice of all membership meetings and site visits and clear all correspondence with Local 715. The parties acknowledge that Local 715 has the ultimate responsibility for collective bargaining matters on behalf of the Stanford facility unit.

6. **Services Provided By Local 715**

For the duration of this Agreement, Local 715 shall continue to administer the collection of membership dues, and shall have access to, and may assist with, all membership meetings, and shall have access to all records associated with the bargaining unit.

7. **Designation of Agency Status**

Local 715 shall notify the Employer in writing of its designation of the appropriate employees of UHW to serve as the agents of Local 715 in providing services to Local 715's membership at the Stanford facility.

Should the Employer challenge or refuse to accept the legitimacy of this Servicing Agreement, the parties will cooperate in processing the legal actions necessary to its enforcement. (This may include filing an unfair labor practice charge under the name of Local 715). UHW will provide professional assistance in this process. During the pendency of this process, Local 715 will continue to provide representation and the administration of all aspects of the collective bargaining agreement through its own staff until such matter is resolved.

8. **Chapter Structure and Members' Rights**

a) Following the implementation of this Servicing Agreement, Local 715's unit at the Stanford facility shall maintain the same officers and other employee-representatives, under the same internal Chapter structure that existed prior to implementation of this Agreement;

b) Following implementation of this Servicing Agreement, Local 715 members at the Stanford facility will continue to be full members of Local 715, with the right to vote in Local 715 elections and otherwise participate in Local 715's affairs. Employees in the bargaining unit will be offered Associate Member status with UHW but shall keep whatever membership rights are accorded them under the Local 715 by-laws and the Service Employees nternational Union constitution;

c) Nothing herein shall prohibit UHW from permitting Local 715's Chapter leaders or members from the Stanford facility to participate in UHW educational functions, or appearing as guests at other UHW functions.

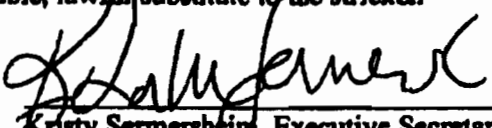
9. Severability

The parties hereto believe that all provisions of this Servicing Agreement comply with applicable law. However, should any position of this Agreement be found illegal by any tribunal of competent jurisdiction, this shall not affect the remainder of the Agreement. Rather, the parties shall promptly meet to negotiate an acceptable, lawful substitute to the stricken provisions.


Sal Roselli, President, UHW

Date

2/18/06


Kristy Sermersheim, Executive Secretary,
Local 715

Date

2/20/2006

EXHIBIT FF

08/21/2006 14:22 FAX 408 954 1538

LOCAL 715

003

STEWART WEINBERG
DAVID A. ROSENBERG
WILLIAM A. SOKOL
VINCENT A. KOWALSKI, JR.
W. DAVID BROWN
ELYN M. MCKELSON
DAVID E. POKLE
JAMES R. TOLSON
SANDRA P. BROWN
CHRISTINE L. BROWN
JAMES J. BROWN
THOMAS P. BROWN
ANTHONY R. BROWN
MATTHEW J. BROWN
ARLEY K. BROWN
LEON B. BROWN
PATRICIA A. BROWN
ALAN D. BROWN
A. BROWN
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Alameda, CA 94501-1081
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LOU K. ACHARD -
ALAN L. VEE
MICHAEL M. PHILLIPS
MICHAEL D. PHILLIPS
WILLIAM A. PHILLIPS
CONSTANCE E. LORAND-SHUTTA
DAVID P. BROWN
LYNNE A. BROWN
MARGARET CHANLA

PATRICIA M. BATES, Of Counsel
ROBERTA D. PERMAN, Of Counsel
JOHN PLOTZ, Of Counsel

* Also admitted in Arizona
** Admitted in Nevada
*** Also admitted in Nevada

August 17, 2006

Larry Arnold
Foley & Lardner
One Maritime Plaza, Sixth Floor
San Francisco, CA 94111-3404

Re: Servicing Agreement

Dear Mr. Arnold:

Per your request, enclosed please find the Servicing Agreement between Local 715 and UHW. For your information, it is modeled on the servicing agreement which has expressly been upheld as lawful by the NLRB, see Suburban Pavilion.

I trust this will calm any insecurities you and/or your client may have concerning this matter and that henceforth you will recognize that UHW is servicing Local 715, which continues to be the exclusive bargaining representative of the bargaining unit at the Stanford Medical Facilities.

If you have any questions or comments, please do not hesitate to contact me.

Sincerely,

William A. Sokol for
William A. Sokol

WAS/jys
opeiu 3 afl-cio(1)

Enclosure

1/431225

SEIU0028

PASADENA OFFICE
301 North Lake Avenue, Suite 310
Pasadena, CA 91101-5122
TEL 626.795.5225 FAX 626.795.5888

SACRAMENTO OFFICE
428 J Street, Suite 520
Sacramento, CA 95814-3341
TEL 916.442.8880 FAX 916.442.0344

HONOLULU OFFICE
1089 Alakoa Street, Suite 1002
Honolulu, HI 96813-4800
TEL 808.538.9880 FAX 808.538.9881

RECEIVED AUG-21-06 13:24

FROM-408 954 1538

TO-SEIU

PAGE 003

EXHIBIT GG

U.S. Department of Labor
Office of Labor-Management
Standards
Washington, DC 20210

FORM LM-15 TRUSTEESHIP REPORT

Form approved
Office of Management
and Budget
No. 1215-0188
Expires 11-30-2009

For Official Use
Only

This report is mandatory under P.L. 86-257 as amended. Failure to comply may result in criminal prosecution, fines, or civil penalties as provided by 29 U.S.C. 481.

READ THE INSTRUCTIONS CAREFULLY BEFORE PREPARING THIS REPORT.

1. File Number of Labor Organization Held in Trusteeship 513-588	2. Type of Report Initial (complete pages 1 through 4.) <input checked="" type="checkbox"/> Semiannual for period ending (Complete pages 1 and 2 only.) 12 / 8 / 2007	3. Date Trusteeship Established 6 / 8 / 2007
4. Labor Organization Held in Trusteeship Affiliation or Organization Name Service Employees International Union Designation LU - Local Union Designation Number 715 Unit Name (if any) P.O. Box, Bldg. and Room No., if any Number and Street 2302 Zanker Road City San Jose State California ZIP Code + 4 95134		
5. Labor Organization Imposing the Trusteeship Name Service Employees International Union File Number 000-137 P.O. Box, Building and Room Number, if any Number and Street 1800 Massachusetts Avenue, NW City Washington State District of Columbia ZIP Code + 4 20036		
6. List the article(s) and section(s) of the constitution which specifically authorize imposition of the trusteeship: Article VIII, Sections 7(a) and 7(f).		

Signatures

Each of the undersigned, duly authorized officials of the labor organization imposing the trusteeship over the above labor organization, declares, under penalty of perjury and other applicable penalties of law, that all of the information submitted in this report (including the information contained in any accompanying documents) has been examined by the signatory and is, to the best of the undersigned's knowledge and belief, true, correct, and complete. (See the section on penalties in the instructions.)

24. Signed <u>Andrew J. Stein</u> Other (Specify) International President On <u>5/20/08</u> (202) 730-7000 <u>Anna S. King</u> Date Signature Number	President (if other title, see instructions.)	26. Signed <u>DW Smith</u> Trustee On <u>05/19/08</u> (408) 954-1538 Date Telephone Number	Trustee (if other title, see instructions.)
25. Signed _____ Other (Specify) International Secretary-Treasurer On <u>5/20/08</u> (202) 730-7000 Date Telephone Number	Treasurer (if other title, see instructions.)	27. Signed _____ Trustee On _____ Date Telephone Number	Trustee (if other title, see instructions.)

Name of Labor Organization Held in Trusteeship Service Employees International Union	File Number 513-588
---	------------------------

7. Check the reason(s) for establishing or continuing the trusteeship:

- a. To correct corruption or financial malpractice.
- ☒ b. To assure the performance of collective bargaining agreements or other duties of a bargaining representative.
- c. To restore democratic procedures.
- d. Other.

8. Provide a detailed statement which explains each reason checked in Item 7, above.

As the result of changes in the jurisdiction of SEIU local unions in California, Local 715 is in the process of reorganizing the majority of its members into other SEIU local unions. The shift of a large majority of Local 715 members, and resources associated with those members, to other SEIU unions is making it difficult for Local 715 to carry out its remaining collective bargaining responsibilities and to defend its status as collective bargaining agent. The significant decline in Local 715's membership and resources has impaired Local 715's ability to operate as contemplated by the Local 715 Constitution and Bylaws. The process of reorganizing the remaining Local 715 members into their new SEIU local unions is still underway.

9. During the period covered by this report

- a. Did a convention or other policy-determining body meet to which the trustee labor organization sent delegates or would have sent delegates if not in trusteeship?

Yes ☒ No

(If the answer is "Yes," complete and file Form LM-15A.)

- b. Did the labor organization imposing the trusteeship hold an election of officers?

Yes ☒ No

(If the answer is "Yes," complete and file Form LM-15A.)

07/24/07 15:18 FAX 202 693 1345

0002

530

U.S. Department of Labor
Office of Labor-Management
Standards
Washington, DC 20210

FORM LM-15 TRUSTEESHIP REPORT

Form approved
Office of Management
and Budget
No. 1215-0168
Expires 11-30-2009

For Official Use

This report is mandatory under P.L. 86-327 as amended. Failure to comply may result in criminal prosecution, fines, or civil penalties as provided by 29 U.S.C. 461.

READ THE INSTRUCTIONS CAREFULLY BEFORE PREPARING THIS REPORT.

1. File Number of Labor Organization Held in Trusteeship 513-588	2. Type of Report <input checked="" type="checkbox"/> Initial (complete pages 1 through 4.) Semiannual for period ending (Complete pages 1 and 2 only.) / /	3. Date Trusteeship Established 6 / 8 / 2007
4. Labor Organization Held in Trusteeship Affiliation or Organization Name <u>Service Employees International Union</u> Designation <u>LJ - Local Union</u> Designation Number <u>715</u> Unit Name (if any)		
P.O. Box, Bldg. and Room No., if any <u>Number and Street 2302 Sanker Road</u> <u>City San Jose</u> <u>State California</u> ZIP Code +4 <u>95134</u>		
5. Labor Organization Imposing the Trusteeship Name <u>Service Employees International Union</u> File Number <u>000-137</u> P.O. Box, Building and Room Number, if any <u>Number and Street 1600 Massachusetts Avenue, NW</u> <u>City Washington</u> State <u>District of Columbia</u> ZIP Code +4 <u>20036</u>		
6. List the article(s) and section(s) of the constitution which specifically authorize imposition of the trusteeship: <u>Article VIII, Sections 7(a) and 7(E).</u>		

Signatures

Each of the undersigned, duly authorized officials of the labor organization imposing the trusteeship over the above labor organization, declares, under penalty of perjury and other applicable penalties of law, that all of the information submitted in this report (including the information contained in any accompanying documents) has been examined by the signatory and is, to the best of the undersigned's knowledge and belief, true, correct, and complete. (See the section on penalties in the instructions.)

24. Signed <u>Andrew J. Stein</u> Other (Specify) <u>International President</u> On <u>7/9/07</u> (202) 730-7000 Date Telephone Number	25. Signed <u>Anna Singer</u> Other (Specify) <u>International Secretary-Treasurer</u> On <u>7/9/07</u> (202) 730-7000 Date Telephone Number	26. Signed <u>B.W. (Rusty) Smith</u> Trustee (If other title, see instructions.) On <u>07/06/07</u> (408) 954-1538 Date Telephone Number	27. Signed _____ Trustee (If other title, see instructions.) On _____ Date Telephone Number
---	---	---	--

07/24/07 15:18 FAX 202 693 1345

003

Name of Labor Organization Held in Trusteeship Service Employees International Union	File Number 513-588
---	------------------------

7. Check the reason(s) for establishing or continuing the trusteeship:

- a. To correct corruption or financial mispractice.
- ☒ b. To assure the performance of collective bargaining agreements or other duties of a bargaining representative.
- c. To restore democratic procedures.
- d. Other.

8. Provide a detailed statement which explains each reason checked in item 7, above.

As the result of changes in the jurisdiction of SEIU local unions in California, Local 715 is in the process of reorganizing the majority of its members into other SEIU local unions. The shift of a large majority of Local 715 members, and resources associated with those members, to other SEIU unions is making it difficult for Local 715 to carry out its remaining collective bargaining responsibilities and to defend its status as collective bargaining agent. The significant decline in Local 715's membership and resources has impaired Local 715's ability to operate as contemplated by the Local 715 Constitution and Bylaws.

9. During the period covered by this report

- a. Did a convention or other policy-determining body meet to which the trustee labor organization sent delegates or would have sent delegates if not in trusteeship?

Yes ☒ No

(If the answer is "Yes," complete and file Form LM-15A.)

- b. Did the labor organization imposing the trusteeship hold an election of officers?

Yes ☒ No

(If the answer is "Yes," complete and file Form LM-15A.)

07/24/07 15:19 FAX 202 693 1345

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Name of Labor Organization Held in Trusteeship - Service Employees International Union	File Number 513-588
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Statement of Assets and Liabilities (Complete for Initial Report Only)					
Assets as of Date Trusteeship Imposed			Liabilities as of Date Trusteeship Imposed		
Item	From Sch. #	Amount	Item	From Sch. #	Amount
10. Cash		3,643,833	18. Accounts Payable		289,653
11. Accounts Receivable		6,465	19. Loans Payable	6	0
12. Loans Receivable	1	0	20. Mortgages Payable		0
13. U.S. Treasury Securities			21. Other Liabilities	4	1,127,359
14. Investments	2	0	22. TOTAL LIABILITIES		1,427,122
15. Fixed Assets	5	326,075	23. NET ASSETS (Item 17 less Item 22)		
16. Other Assets	3	251,217			
17. TOTAL ASSETS		4,659,985			3,231,863

Schedule 1 - Loans Receivable (See instructions for Item 12)		
(A) Name of officer, employee, member, or business enterprise	(B) Purpose of loan, security, if any, and terms for repayment	(C) Amount
1. 0		0
2. 0		0
3. 0		0
4. Total from additional pages (if any)		0
5. Total of loans not listed above		0
6. Total of Lines 1 through 5		0

Schedule 2 - Investments (See instructions for Item 14)		Schedule 3 - Other Assets (See instructions for Item 16)	
(A) Description	(B) Amount	(A) Description	(B) Book Value
Marketable Securities:		1. Prepaid Expenses	15,285
1. Total Cost	0	2. Deposit	33,540
2. Total Book Value		3. Due to/from 501 others	221,392
3. List each marketable security that has a book value over \$1,000 and exceeds 20% of Line 2.		4.	0
(a)		5.	
(b)		6.	
(c) Total from additional pages (if any)	0	7. Total from additional pages (if any)	0
Other Investments:		8. Total of Lines 1 through 7	261,217
4. Total Cost	0	Schedule 4 - Other Liabilities (See instructions for Item 21)	
5. Total Book Value	0	(A) Description	(B) Amount
6. List each other investment which has a book value over \$1,000 and exceeds 20% of Line 5. Also list each subsidiary or trust which is an investment.		1. Capital lease	17,382
(a)		2. IRSS Payable	188,187
(b)	0	3. Security Deposit	2,500
(c) Total from additional pages (if any)	0	4. Other Payable	264,647
7. Total of Lines 2 and 5	0	5. Accrued Vacation	654,163
		6.	0
		7. Total from additional pages (if any)	0
		8. Total of Lines 1 through 7	1,127,359

Name of Labor Organization Held in Trusteeship Service Employees International Union	File Number 513-588
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Schedule B - Fixed Assets (See instructions for Item 15)				
(A) Description	(B) Cost or Other Basis	(C) Total Depreciation or Amount Expensed	(D) Book Value	(E) Fair Market Value
1. Land (give location)	0			
2. Total from additional pages (if any)	0		0	0
3. Buildings (give location)	0			
4. Total from additional pages (if any)	0	0	0	0
5. Automobiles and Other Vehicles	0			
6. Office Furniture and Equipment	1,004,363	478,188	526,075	
7. Other Fixed Assets			0	
8. Total of Lines 1 through 7	1,004,363	478,188	526,075	0

Schedule C - Loans Payable (See instructions for Item 16)	
(A) Source	(B) Amount
1.	0
2.	0
3.	0
4.	0
5. Total from additional pages (if any)	0
6. Total of Lines 1 through 5.	0

EXHIBIT HH

ADRMOP, E-Filing, RELATE

**U.S. District Court
California Northern District (San Jose)
CIVIL DOCKET FOR CASE #: 5:08-cv-00213-JF**

Service Employees International Union, Local 715 v.
Stanford Hospital and Clinics and Lucile Packard Children's
Hospital

Assigned to: Hon. Jeremy Fogel

Referred to: Magistrate Judge Richard Seeborg

Relate Case Cases: 5:07-cv-05158-JF

5:08-cv-00215-JF

5:08-cv-00216-JF

5:08-cv-01727-JF

5:08-cv-01726-JF

Cause: 29:151 Labor: Review of Agency Action

Date Filed: 01/11/2008

Jury Demand: None

Nature of Suit: 720 Labor: Labor/Mgt.
Relations

Jurisdiction: Federal Question

Plaintiff

**Service Employees International
Union, Local 715**

represented by **W. Daniel Boone**

Weinberg, Roger & Rosenfeld
1001 Marina Village Parkway
Suite 200

Alameda, CA 94501-1091

510-337-1001

Fax: 510-337-1023

Email: courtnotices@unioncounsel.net

LEAD ATTORNEY

ATTORNEY TO BE NOTICED

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ATTORNEY TO BE NOTICED

V.

Defendant

**Stanford Hospital and Clinics and
Lucile Packard Children's Hospital**

represented by **Laurence R. Arnold**
(See above for address)
LEAD ATTORNEY
ATTORNEY TO BE NOTICED

Scott Powers Inciardi
Attorney at Law
1 Maritime Plaza, 6th Floor
San Francisco, CA 94111
415-434-4484
Fax: 415-434-4507
Email: sinciardi@foley.com
ATTORNEY TO BE NOTICED

V.

Respondent

**Stanford Hospital & Clinics and
Lucile Packard Children's Hospital**

represented by **Eileen Regina Ridley**
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One Maritime Plaza
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LEAD ATTORNEY
ATTORNEY TO BE NOTICED

Laurence R. Arnold
(See above for address)

ATTORNEY TO BE NOTICED

Scott Powers Inciardi

(See above for address)

ATTORNEY TO BE NOTICED

Counter-claimant

**Stanford Hospital & Clinics and
Lucile Packard Children's Hospital**

represented by **Eileen Regina Ridley**

(See above for address)

LEAD ATTORNEY

ATTORNEY TO BE NOTICED

Laurence R. Arnold

(See above for address)

ATTORNEY TO BE NOTICED

Scott Powers Inciardi

(See above for address)

ATTORNEY TO BE NOTICED

Counter-claimant

**Stanford Hospital and Clinics and
Lucile Packard Children's Hospital**

represented by **Laurence R. Arnold**

(See above for address)

LEAD ATTORNEY

ATTORNEY TO BE NOTICED

Scott Powers Inciardi

(See above for address)

ATTORNEY TO BE NOTICED

V.

Counter-defendant

**Service Employees International
Union, Local 715**

represented by **W. Daniel Boone**

(See above for address)

LEAD ATTORNEY

ATTORNEY TO BE NOTICED

Bruce A. Harland

(See above for address)

ATTORNEY TO BE NOTICED

Laurence R. Arnold

(See above for address)

ATTORNEY TO BE NOTICED

William A. Sokol

(See above for address)

ATTORNEY TO BE NOTICED

Date Filed	#	Docket Text
01/11/2008	<u>1</u>	PETITION TO CONFIRM ARBITRATION AWARD (no process) against Stanford Hospital and Clinics and Lucile Packard Children's Hospital (Filing fee \$ 350, receipt number 34611014520.). Filed by Service Employees International Union, Local 715. (slh, COURT STAFF) (Filed on 1/11/2008) (Additional attachment(s) added on 1/16/2008: # <u>1</u> Exhibit A, # <u>2</u> Exhibit B) (slh, COURT STAFF). (Entered: 01/15/2008)
01/11/2008	<u>2</u>	Administrative MOTION to Consider Whether Cases Should Be Related re C 07-5158 MMC filed by Service Employees International Union, Local 715. (slh, COURT STAFF) (Filed on 1/11/2008) (slh, COURT STAFF). (Entered: 01/15/2008)
01/11/2008	<u>3</u>	ADR SCHEDULING ORDER: Case Management Conference set for 4/23/2008 01:30 PM. Case Management Statement due by 4/16/2008. (Attachments: # <u>1</u> EMC Standing Order, # <u>2</u> Case Management Standing Order)(slh, COURT STAFF) (Filed on 1/11/2008) (Entered: 01/15/2008)
01/11/2008		CASE DESIGNATED for Electronic Filing. (slh, COURT STAFF) (Filed on 1/11/2008) (Entered: 01/15/2008)
01/23/2008		Summons Issued as to Stanford Hospital and Clinics and Lucile Packard Children's Hospital. (slh, COURT STAFF) (Filed on 1/23/2008) (Entered: 01/24/2008)
01/30/2008	<u>4</u>	Declination to Proceed Before a U.S. Magistrate Judge by Service Employees International Union, Local 715 and <i>Request for Reassignment to a United States District Judge</i> . (Harland, Bruce) (Filed on 1/30/2008) (Entered: 01/30/2008)
01/31/2008	<u>5</u>	CLERK'S NOTICE of Impending Reassignment to U.S. District Judge (bpf, COURT STAFF) (Filed on 1/31/2008) (Entered: 01/31/2008)
02/01/2008	<u>6</u>	ORDER REASSIGNING CASE. Case reassigned to Judge Hon. William H. Alsup for all further proceedings. Magistrate Judge Edward M. Chen no longer assigned to the case. Signed by Executive Committee on 2/1/08. (ha, COURT STAFF) (Filed on 2/1/2008) (Entered: 02/01/2008)
02/05/2008	<u>7</u>	*** FILED IN ERROR. PLEASE SEE DOCKET # 10 . *** SUMMONS Returned Executed by Service Employees International Union, Local 715. Stanford Hospital and Clinics and Lucile Packard Children's Hospital served on 1/29/2008, answer due 2/18/2008. (Harland, Bruce) (Filed on 2/5/2008) Modified on 2/6/2008 (ewn, COURT STAFF). (Entered: 02/05/2008)
02/05/2008	<u>8</u>	ACKNOWLEDGEMENT OF SERVICE Executed as to <u>7</u> Summons Returned Executed Acknowledgement filed by Service Employees International Union, Local 715. (Harland, Bruce) (Filed on 2/5/2008) (Entered: 02/05/2008)
02/06/2008	<u>9</u>	CERTIFICATE OF SERVICE by Service Employees International Union, Local 715 re <u>4</u> Declination to Proceed Before a U.S. Magistrate Judge, <u>5</u> Clerk's

		Notice of Impending Reassignment, 6 Order Reassigning Case, Case Assigned/Reassigned (Harland, Bruce) (Filed on 2/6/2008) (Entered: 02/06/2008)
02/06/2008	<u>10</u>	SUMMONS Returned Executed by Service Employees International Union, Local 715. <i>CORRECTION OF DOCKET # 7</i> (Harland, Bruce) (Filed on 2/6/2008) (Entered: 02/06/2008)
02/19/2008	<u>11</u>	MOTION to Change Venue filed by Service Employees International Union, Local 715. (Harland, Bruce) (Filed on 2/19/2008) Modified on 2/25/2008 (cv, COURT STAFF). (Entered: 02/19/2008)
02/19/2008	<u>12</u>	Proposed Order re <u>11</u> MOTION to Change Venue <i>OF INTRA-DISTRICT ASSIGNMENT</i> by Service Employees International Union, Local 715. (Harland, Bruce) (Filed on 2/19/2008) (Entered: 02/19/2008)
02/20/2008	<u>13</u>	CERTIFICATE OF SERVICE by Service Employees International Union, Local 715 re <u>11</u> MOTION to Change Venue <i>OF INTRA-DISTRICT ASSIGNMENT</i> , <u>12</u> Proposed Order (Harland, Bruce) (Filed on 2/20/2008) (Entered: 02/20/2008)
02/22/2008	<u>14</u>	ORDER by Judge Alsup granting <u>11</u> Motion to Change Venue (whalc1, COURT STAFF) (Filed on 2/22/2008) (Entered: 02/22/2008)
02/25/2008	<u>15</u>	ORDER REASSIGNING CASE. Case reassigned to Judge Hon. James Ware for all further proceedings. Judge Hon. William H. Alsup no longer assigned to the case. Signed by Executive Committee on 2/25/08. (ha, COURT STAFF) (Filed on 2/25/2008) (Entered: 02/25/2008)
02/26/2008	<u>16</u>	CERTIFICATE OF SERVICE by Service Employees International Union, Local 715 re <u>14</u> Order on Motion to Change Venue (Harland, Bruce) (Filed on 2/26/2008) (Entered: 02/26/2008)
02/29/2008	<u>17</u>	ORDER RELATING CASES CV-07-5158-JF, CV-08-215-JF AND CV-08-216-JF. Signed by Judge Jeremy Fogel on 2/22/08. (dlm, COURT STAFF) (Filed on 2/29/2008) (Entered: 02/29/2008)
02/29/2008		Pursuant to Related Case Order (<u>17</u>). Case reassigned to District Judge Jeremy Fogel for all further proceedings and Magistrate Judge Richard Seeborg for all discovery matters. District Judge James Ware no longer assigned to the case. (tsh, COURT STAFF) (Filed on 2/29/2008) (Entered: 02/29/2008)
03/06/2008	<u>18</u>	ANSWER to Complaint <i>Petition to Confirm Arbitration Award</i> , COUNTERCLAIM to <i>Vacate Arbitration Award</i> against Service Employees International Union, Local 715 by Stanford Hospital and Clinics and Lucile Packard Children's Hospital. (Attachments: # <u>1</u> Exhibit Exhibit A to Answer and Counter-Petition to Vacate Arbitration Award, # <u>2</u> Exhibit Exhibit B to Answer and Counter-Petition to Vacate Arbitration Award)(Arnold, Laurence) (Filed on 3/6/2008) (Entered: 03/06/2008)
03/06/2008	<u>19</u>	Certificate of Interested Entities by Stanford Hospital and Clinics and Lucile Packard Children's Hospital re <u>18</u> Answer to Complaint,, Counterclaim, (Arnold, Laurence) (Filed on 3/6/2008) (Entered: 03/06/2008)

03/06/2008	<u>20</u>	NOTICE of Appearance by Scott Powers Inciardi (Inciardi, Scott) (Filed on 3/6/2008) (Entered: 03/06/2008)
03/06/2008	<u>21</u>	NOTICE of Appearance by Eileen Regina Ridley (Ridley, Eileen) (Filed on 3/6/2008) (Entered: 03/06/2008)
03/13/2008	<u>22</u>	CERTIFICATE OF SERVICE by Service Employees International Union, Local 715 re <u>15</u> Order Reassigning Case, Case Assigned/Reassigned (Harland, Bruce) (Filed on 3/13/2008) (Entered: 03/13/2008)
03/18/2008	<u>23</u>	CLERK'S NOTICE Case Management Conference rescheduled for 4/25/2008 10:30 AM. (jfsec, COURT STAFF) (Filed on 3/18/2008) (Entered: 03/18/2008)
03/27/2008	<u>24</u>	NOTICE by Stanford Hospital & Clinics and Lucile Packard Children's Hospital re <u>18</u> Answer to Complaint,, Counterclaim, <i>of Errata regarding Answer and Counter-Petition to Vacate Arbitration Award</i> (Attachments: # <u>1</u> Exhibit Exhibit A to Notice of Errata Regarding Answer and Counter-Petition to Vacate Arbitration Award)(Inciardi, Scott) (Filed on 3/27/2008) (Entered: 03/27/2008)
03/27/2008	<u>25</u>	Proposed Order re <u>24</u> Notice (Other), Notice (Other) <i>of Errata regarding Answer and Counter-Petition to Vacate Arbitration Award</i> by Stanford Hospital & Clinics and Lucile Packard Children's Hospital. (Inciardi, Scott) (Filed on 3/27/2008) (Entered: 03/27/2008)
03/31/2008	<u>26</u>	ORDER GRANTING REQUEST TO CORRECT TYPOGRAPHICAL ERRORS re <u>24</u> Notice (Other), Notice (Other) filed by Stanford Hospital & Clinics and Lucile Packard Children's Hospital. Signed by Judge Jeremy Fogel on 3/31/08. (jfsec, COURT STAFF) (Filed on 3/31/2008) (Entered: 03/31/2008)
04/10/2008	<u>27</u>	ADR Clerks Notice re: Non-Compliance with Court Order. (tjs, COURT STAFF) (Filed on 4/10/2008) (Entered: 04/10/2008)
04/17/2008	<u>28</u>	ADR Certification (ADR L.R. 3-5b) of discussion of ADR options (Harland, Bruce) (Filed on 4/17/2008) (Entered: 04/17/2008)
04/17/2008	<u>29</u>	NOTICE of need for ADR Phone Conference (ADR L.R. 3-5 d) re <u>3</u> ADR Scheduling Order re document <u>3</u>) (Harland, Bruce) (Filed on 4/17/2008) (Entered: 04/17/2008)
04/17/2008	<u>30</u>	ADR Certification (ADR L.R. 3-5b) of discussion of ADR options (Inciardi, Scott) (Filed on 4/17/2008) (Entered: 04/17/2008)
04/21/2008	<u>31</u>	JOINT CASE MANAGEMENT STATEMENT filed by Service Employees International Union, Local 715, Stanford Hospital and Clinics and Lucile Packard Children's Hospital. (Arnold, Laurence) (Filed on 4/21/2008) (Entered: 04/21/2008)
04/25/2008	<u>32</u>	Minute Entry: Further Case Management Conference held on 4/25/2008 before Judge Jeremy Fogel (Date Filed: 4/25/2008). Motion Hearing set for 8/29/2008 09:00 AM. All other hearing dates are vacated.(Court Reporter Summer Clanton.) (dlm, COURT STAFF) (Date Filed: 4/25/2008) (Entered: 04/28/2008)

07/02/2008	<u>33</u>	MOTION to Continue <i>Deadline to File/Hear Dispositive Motions</i> filed by Stanford Hospital & Clinics and Lucile Packard Children's Hospital. (Ridley, Eileen) (Filed on 7/2/2008) (Entered: 07/02/2008)
07/02/2008	<u>34</u>	Declaration in Support of <u>33</u> MOTION to Continue <i>Deadline to File/Hear Dispositive Motions</i> filed by Stanford Hospital & Clinics and Lucile Packard Children's Hospital. (Attachments: # <u>1</u> Exhibit A & B to Declaration of Eileen R. Ridley, # <u>2</u> Exhibit C to Declaration of Eileen R. Ridley, # <u>3</u> Exhibit D to Declaration of Eileen R. Ridley, # <u>4</u> Exhibit E to Declaration of Eileen R. Ridley, # <u>5</u> Exhibit F to Declaration of Eileen R. Ridley, # <u>6</u> Exhibit G to Declaration of Eileen R. Ridley, # <u>7</u> Exhibit H to Declaration of Eileen R. Ridley, # <u>8</u> Exhibit I to Declaration of Eileen R. Ridley, # <u>9</u> Exhibit J to Declaration of Eileen R. Ridley, # <u>10</u> Exhibit K to Declaration of Eileen R. Ridley, # <u>11</u> Exhibit L to Declaration of Eileen R. Ridley, # <u>12</u> Exhibit M & N to Declaration of Eileen R. Ridley)(Related document(s) <u>33</u>) (Ridley, Eileen) (Filed on 7/2/2008) (Entered: 07/02/2008)
07/02/2008	<u>35</u>	Proposed Order re <u>33</u> MOTION to Continue <i>Deadline to File/Hear Dispositive Motions</i> , <u>34</u> Declaration in Support,,, by Stanford Hospital & Clinics and Lucile Packard Children's Hospital. (Ridley, Eileen) (Filed on 7/2/2008) (Entered: 07/02/2008)
07/08/2008	<u>36</u>	Memorandum in Opposition re <u>33</u> MOTION to Continue <i>Deadline to File/Hear Dispositive Motions</i> filed by Service Employees International Union, Local 715. (Harland, Bruce) (Filed on 7/8/2008) (Entered: 07/08/2008)
07/08/2008	<u>37</u>	Declaration of Bruce A. Harland in Support of <u>36</u> Memorandum in Opposition <i>To Motion to Continue Deadline to File/Hear Dispositive Motion</i> filed by Service Employees International Union, Local 715. (Attachments: # <u>1</u> Exhibit A to Declaration of Bruce A. Harland in Support of SEIU Local 715's Opposition to Motion to Continue Deadline to File-Hear Dispositive Motion, # <u>2</u> Exhibit B to Declaration of Bruce A. Harland in Support of SEIU Local 715's Opposition to Motion to Continue Deadline to File-Hear Dispositive Motion, # <u>3</u> Exhibit C to Declaration of Bruce A. Harland in Support of SEIU Local 715's Opposition to Motion to Continue Deadline to File-Hear Dispositive Motion, # <u>4</u> Exhibit D to Declaration of Bruce A. Harland in Support of SEIU Local 715's Opposition to Motion to Continue Deadline to File-Hear Dispositive Motion, # <u>5</u> Exhibit E to Declaration of Bruce A. Harland in Support of SEIU Local 715's Opposition to Motion to Continue Deadline to File-Hear Dispositive Motion) (Related document(s) <u>36</u>) (Harland, Bruce) (Filed on 7/8/2008) (Entered: 07/08/2008)
07/11/2008	<u>38</u>	MOTION to Compel <i>Responses to Discovery Subpoena Propounded to UHW</i> filed by Stanford Hospital & Clinics and Lucile Packard Children's Hospital. Motion Hearing set for 8/27/2008 09:30 AM in Courtroom #4, 5th Floor, San Jose. (Arnold, Laurence) (Filed on 7/11/2008) (Entered: 07/11/2008)
07/11/2008	<u>39</u>	MOTION to Compel <i>Responses to Discovery Subpoena Propounded to Local 521</i> filed by Stanford Hospital & Clinics and Lucile Packard Children's Hospital. Motion Hearing set for 8/27/2008 09:30 AM in Courtroom #4, 5th Floor, San Jose. (Arnold, Laurence) (Filed on 7/11/2008) (Entered: 07/11/2008)

07/11/2008	<u>40</u>	MOTION to Compel <i>Further Responses to Discovery Requests Propounded to Local 715</i> filed by Stanford Hospital & Clinics and Lucile Packard Children's Hospital. Motion Hearing set for 8/27/2008 09:30 AM in Courtroom #4, 5th Floor, San Jose. (Arnold, Laurence) (Filed on 7/11/2008) (Entered: 07/11/2008)
07/11/2008	<u>41</u>	Declaration of Eileen R. Ridley in Support of <u>40</u> MOTION to Compel <i>Further Responses to Discovery Requests Propounded to Local 715</i> , <u>38</u> MOTION to Compel <i>Responses to Discovery Subpoena Propounded to UHW</i> , <u>39</u> MOTION to Compel <i>Responses to Discovery Subpoena Propounded to Local 521</i> filed by Stanford Hospital & Clinics and Lucile Packard Children's Hospital. (Attachments: # <u>1</u> Exhibit Exhibit A to Declaration of Eileen R. Ridley, # <u>2</u> Exhibit Exhibit B to Declaration of Eileen R. Ridley, # <u>3</u> Exhibit Exhibit C to Declaration of Eileen R. Ridley, # <u>4</u> Exhibit Exhibit D to Declaration of Eileen R. Ridley, # <u>5</u> Exhibit Exhibit E to Declaration of Eileen R. Ridley, # <u>6</u> Exhibit Exhibit F to Declaration of Eileen R. Ridley, # <u>7</u> Exhibit Exhibit G to Declaration of Eileen R. Ridley, # <u>8</u> Exhibit Exhibit H to Declaration of Eileen R. Ridley, # <u>9</u> Exhibit Exhibit I to Declaration of Eileen R. Ridley, # <u>10</u> Exhibit Exhibit J to Declaration of Eileen R. Ridley, # <u>11</u> Exhibit Exhibit K to Declaration of Eileen R. Ridley, # <u>12</u> Exhibit Exhibit L to Declaration of Eileen R. Ridley, # <u>13</u> Exhibit Exhibit M to Declaration of Eileen R. Ridley, # <u>14</u> Exhibit Exhibit N to Declaration of Eileen R. Ridley, # <u>15</u> Exhibit Exhibit O to Declaration of Eileen R. Ridley, # <u>16</u> Exhibit Exhibit P to Declaration of Eileen R. Ridley, # <u>17</u> Exhibit Exhibit Q to Declaration of Eileen R. Ridley, # <u>18</u> Exhibit Exhibit R to Declaration of Eileen R. Ridley, # <u>19</u> Exhibit Exhibit S to Declaration of Eileen R. Ridley, # <u>20</u> Exhibit Exhibit T to Declaration of Eileen R. Ridley, # <u>21</u> Exhibit Exhibit U to Declaration of Eileen R. Ridley, # <u>22</u> Exhibit Exhibit V to Declaration of Eileen R. Ridley, # <u>23</u> Exhibit Exhibit W to Declaration of Eileen R. Ridley, # <u>24</u> Exhibit Exhibit X to Declaration of Eileen R. Ridley, # <u>25</u> Exhibit Exhibit Y to Declaration of Eileen R. Ridley, # <u>26</u> Exhibit Exhibit Z to Declaration of Eileen R. Ridley, # <u>27</u> Exhibit Exhibit AA to Declaration of Eileen R. Ridley, # <u>28</u> Exhibit Exhibit BB to Declaration of Eileen R. Ridley, # <u>29</u> Exhibit Exhibit CC to Declaration of Eileen R. Ridley, # <u>30</u> Exhibit Exhibit DD to Declaration of Eileen R. Ridley, # <u>31</u> Exhibit Exhibit EE to Declaration of Eileen R. Ridley, # <u>32</u> Exhibit Exhibit FF to Declaration of Eileen R. Ridley, # <u>33</u> Exhibit Exhibit GG to Declaration of Eileen R. Ridley, # <u>34</u> Exhibit Exhibit HH to Declaration of Eileen R. Ridley, # <u>35</u> Exhibit Exhibit II to Declaration of Eileen R. Ridley, # <u>36</u> Exhibit Exhibit JJ to Declaration of Eileen R. Ridley, # <u>37</u> Exhibit Exhibit KK to Declaration of Eileen R. Ridley, # <u>38</u> Exhibit Exhibit LL to Declaration of Eileen R. Ridley, # <u>39</u> Exhibit Exhibit MM to Declaration of Eileen R. Ridley, # <u>40</u> Exhibit Exhibit NN to Declaration of Eileen R. Ridley, # <u>41</u> Exhibit Exhibit OO to Declaration of Eileen R. Ridley, # <u>42</u> Exhibit Exhibit PP to Declaration of Eileen R. Ridley, # <u>43</u> Exhibit Exhibit QQ to Declaration of Eileen R. Ridley, # <u>44</u> Exhibit Exhibit RR to Declaration of Eileen R. Ridley, # <u>45</u> Exhibit Exhibit SS to Declaration of Eileen R. Ridley, # <u>46</u> Exhibit Exhibit TT to Declaration of Eileen R. Ridley, # <u>47</u> Exhibit Exhibit UU to Declaration of Eileen R. Ridley, # <u>48</u> Exhibit Exhibit VV to Declaration of Eileen R. Ridley, # <u>49</u> Exhibit Exhibit WW to Declaration of Eileen R. Ridley, # <u>50</u> Exhibit Exhibit XX to Declaration of Eileen R. Ridley, # <u>51</u> Exhibit Exhibit YY to Declaration of Eileen R. Ridley, # <u>52</u> Exhibit Exhibit ZZ to Declaration of Eileen R. Ridley, #

		<u>53</u> Exhibit Exhibit AAA to Declaration of Eileen R. Ridley, # <u>54</u> Exhibit Exhibit BBB to Declaration of Eileen R. Ridley, # <u>55</u> Exhibit Exhibit CCC to Declaration of Eileen R. Ridley, # <u>56</u> Exhibit Exhibit DDD to Declaration of Eileen R. Ridley, # <u>57</u> Exhibit Exhibit EEE to Declaration of Eileen R. Ridley, # <u>58</u> Exhibit Exhibit FFF to Declaration of Eileen R. Ridley)(Related document (s) 40 , 38 , 39) (Arnold, Laurence) (Filed on 7/11/2008) (Entered: 07/11/2008)
07/11/2008	<u>42</u>	Proposed Order re <u>41</u> Declaration in Support,,,,,,,,,,,,, <u>38</u> MOTION to Compel Responses to Discovery Subpoena Propounded to UHW by Stanford Hospital & Clinics and Lucile Packard Children's Hospital. (Arnold, Laurence) (Filed on 7/11/2008) (Entered: 07/11/2008)
07/11/2008	<u>43</u>	Proposed Order re <u>41</u> Declaration in Support,,,,,,,,,,,,, <u>40</u> MOTION to Compel Further Responses to Discovery Requests Propounded to Local 715 by Stanford Hospital & Clinics and Lucile Packard Children's Hospital. (Arnold, Laurence) (Filed on 7/11/2008) (Entered: 07/11/2008)
07/11/2008	<u>44</u>	Proposed Order re <u>41</u> Declaration in Support,,,,,,,,,,,,, <u>39</u> MOTION to Compel Responses to Discovery Subpoena Propounded to Local 521 by Stanford Hospital & Clinics and Lucile Packard Children's Hospital. (Arnold, Laurence) (Filed on 7/11/2008) (Entered: 07/11/2008)
07/11/2008	<u>45</u>	MOTION to Compel Depositions of Rusty Smith, Myriam Escamilla and Kristy Sermersheim filed by Stanford Hospital & Clinics and Lucile Packard Children's Hospital. Motion Hearing set for 8/27/2008 09:30 AM in Courtroom #4, 5th Floor, San Jose. (Arnold, Laurence) (Filed on 7/11/2008) (Entered: 07/11/2008)
07/11/2008	<u>46</u>	Declaration of Eileen R. Ridley in Support of <u>45</u> Motion to Compel Depositions filed by Stanford Hospital & Clinics and Lucile Packard Children's Hospital. (Attachments: # <u>1</u> Exhibit Exhibit A to Declaration of Eileen R. Ridley, # <u>2</u> Exhibit Exhibit B to Declaration of Eileen R. Ridley, # <u>3</u> Exhibit Exhibit C to Declaration of Eileen R. Ridley, # <u>4</u> Exhibit Exhibit D to Declaration of Eileen R. Ridley, # <u>5</u> Exhibit Exhibit E to Declaration of Eileen R. Ridley, # <u>6</u> Exhibit Exhibit F to Declaration of Eileen R. Ridley, # <u>7</u> Exhibit Exhibit G to Declaration of Eileen R. Ridley, # <u>8</u> Exhibit Exhibit H to Declaration of Eileen R. Ridley, # <u>9</u> Exhibit Exhibit I to Declaration of Eileen R. Ridley, # <u>10</u> Exhibit Exhibit J to Declaration of Eileen R. Ridley, # <u>11</u> Exhibit Exhibit K to Declaration of Eileen R. Ridley, # <u>12</u> Exhibit Exhibit L to Declaration of Eileen R. Ridley, # <u>13</u> Exhibit Exhibit M to Declaration of Eileen R. Ridley, # <u>14</u> Exhibit Exhibit N to Declaration of Eileen R. Ridley, # <u>15</u> Exhibit Exhibit O to Declaration of Eileen R. Ridley, # <u>16</u> Exhibit Exhibit P to Declaration of Eileen R. Ridley, # <u>17</u> Exhibit Exhibit Q to Declaration of Eileen R. Ridley, # <u>18</u> Exhibit Exhibit R to Declaration of Eileen R. Ridley, # <u>19</u> Exhibit Exhibit S to Declaration of Eileen R. Ridley, # <u>20</u> Exhibit Exhibit T to Declaration of Eileen R. Ridley, # <u>21</u> Exhibit Exhibit U to Declaration of Eileen R. Ridley, # <u>22</u> Exhibit Exhibit V to Declaration of Eileen R. Ridley, # <u>23</u> Exhibit Exhibit W to Declaration of Eileen R. Ridley, # <u>24</u> Exhibit Exhibit X to Declaration of Eileen R. Ridley, # <u>25</u> Exhibit Exhibit Y to Declaration of Eileen R. Ridley, # <u>26</u> Exhibit Exhibit Z to Declaration of Eileen R. Ridley, # <u>27</u> Exhibit Exhibit AA to Declaration of Eileen R. Ridley, # <u>28</u> Exhibit Exhibit BB to Declaration of Eileen R. Ridley, # <u>29</u> Exhibit Exhibit CC to Declaration of Eileen R.

		Ridley, # 30 Exhibit Exhibit DD to Declaration of Eileen R. Ridley, # 31 Exhibit Exhibit EE to Declaration of Eileen R. Ridley, # 32 Exhibit Exhibit FF to Declaration of Eileen R. Ridley, # 33 Exhibit Exhibit GG to Declaration of Eileen R. Ridley, # 34 Exhibit Exhibit HH to Declaration of Eileen R. Ridley, # 35 Exhibit Exhibit II to Declaration of Eileen R. Ridley, # 36 Exhibit Exhibit JJ to Declaration of Eileen R. Ridley, # 37 Exhibit Exhibit KK to Declaration of Eileen R. Ridley, # 38 Exhibit Exhibit LL to Declaration of Eileen R. Ridley, # 39 Exhibit Exhibit MM to Declaration of Eileen R. Ridley, # 40 Exhibit Exhibit NN to Declaration of Eileen R. Ridley, # 41 Exhibit Exhibit OO to Declaration of Eileen R. Ridley, # 42 Exhibit Exhibit PP to Declaration of Eileen R. Ridley, # 43 Exhibit Exhibit QQ to Declaration of Eileen R. Ridley, # 44 Exhibit Exhibit RR to Declaration of Eileen R. Ridley, # 45 Exhibit Exhibit SS to Declaration of Eileen R. Ridley, # 46 Exhibit Exhibit TT to Declaration of Eileen R. Ridley)(Arnold, Laurence) (Filed on 7/11/2008) Modified on 7/14/2008 (gm, COURT STAFF). (Entered: 07/11/2008)
07/11/2008	<u>47</u>	Proposed Order re 46 Declaration in Support,,,,,,,,,,,,, 45 MOTION to Compel <i>Depositions of Rusty Smith, Myriam Escamilla and Kristy Sermersheim</i> by Stanford Hospital & Clinics and Lucile Packard Children's Hospital. (Arnold, Laurence) (Filed on 7/11/2008) (Entered: 07/11/2008)
07/11/2008	<u>48</u>	CLERK'S NOTICE Continuing Motions Hearing. Motions Hearing continued to 9/3/2008 09:30 AM in Courtroom #4, 5th Floor, San Jose. (rssec, COURT STAFF) (Filed on 7/11/2008) (Entered: 07/11/2008)
07/14/2008	<u>49</u>	CERTIFICATE OF SERVICE by Stanford Hospital & Clinics and Lucile Packard Children's Hospital re 41 Declaration in Support,,,,,,,,,,,,, 44 Proposed Order, 39 MOTION to Compel <i>Responses to Discovery Subpoena Propounded to Local 521 on A. Laiacona, Attorney for Local 521, by Federal Express</i> (Ridley, Eileen) (Filed on 7/14/2008) (Entered: 07/14/2008)
07/14/2008	<u>50</u>	CERTIFICATE OF SERVICE by Stanford Hospital & Clinics and Lucile Packard Children's Hospital re 41 Declaration in Support,,,,,,,,,,,,, 38 MOTION to Compel <i>Responses to Discovery Subpoena Propounded to UHW, 42 Proposed Order, on W. Sokol, Attorney for UHW, by Federal Express</i> (Ridley, Eileen) (Filed on 7/14/2008) (Entered: 07/14/2008)